**Reaching Home System Mapping Guide:**

**Planning for Coordinated Access and HIFIS Configuration**

**Document for Designated Communities in BC**

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# Preamble

This section of the guide introduces the federal Reaching Home program, Coordinated Access, the Reaching Home Homelessness Management Information System (HMIS) called the Homeless Individuals and Families Information System (HIFIS), and the Unique Identifier List (List, also sometimes referred to as a By-Name List). It is essential that communities understand these concepts before they engage in system mapping to plan for their local implementation of Coordinated Access and HIFIS configuration under Reaching Home.

**What is the federal Reaching Home program?**

[*Reaching Home: Canada’s Homelessness Strategy*](https://www.canada.ca/en/employment-social-development/programs/homelessness.html) is a community-based program aimed at preventing and reducing homelessness across Canada. The program provides funding directly to urban, Indigenous, rural and remote communities to help them address local homelessness needs by developing and implementing community plans with clear outcomes.

A primary objective of Reaching Home is to enable more effective and efficient community responses to homelessness by introducing Coordinated Access with the community-wide use of HIFIS as a program priority. Developed by Employment and Social Development Canada (ESDC) in collaboration with communities, HIFIS is the Reaching Home HMIS.

All Designated Communities (DCs) and Territorial Homelessness funded communities must implement Coordinated Access and use HIFIS unless an equivalent HMIS was already in use when Reaching Home launched in April 2019. These two funding streams must also adopt an outcomes-based approach and submit a Community Homelessness Report (CHR) each year. CHRs provide Community Entities (CEs) a year-over-year picture of the state of homelessness and the system in place to address it in their geographic area, helping to identify community-level trends specific to cumulative levels of homelessness, inflow into homelessness, outflow from homelessness, and housing-focused outcomes. For more information about the CHR, see the [Reaching Home Community Homelessness Report Reference Guide](https://www.homelessnesslearninghub.ca/library/resources/reaching-home-community-homelessness-report-reporting-tools).

**What is Coordinated Access?**

Coordinated Access is a *process* that connects people experiencing or at-risk of homelessness to a wide range of resources that help them to meet their basic needs and support the next steps of their housing plan. Coordinated Access brings consistency to the service path for accessing housing and related services in a geographic area. Strong systems include a Housing First approach, streamlined service delivery across different types of service providers, and real-time data. A standardized workflow for Coordinated Access includes access points to service, a shared triage and assessment process, and an efficient vacancy matching and referral process with prioritization.

For more information about Coordinated Access, see the [Reaching Home Coordinated Access Guide](https://www.homelessnesslearninghub.ca/sites/default/files/resources/HPD_ReachingHomeCoordinatedAccessGuide_EN_20191030.pdf) and related tools on the [Homelessness Learning Hub](https://www.homelessnesslearninghub.ca/).

**What is the role of HIFIS with Coordinated Access?**

HIFIS is key to the implementation of an effective, high quality Coordinated Access system. As a web-based application, HIFIS makes it possible for different service providers to contribute to shared service plans when serving common clients. This creates a more client-centred approach to service delivery, reducing duplication of effort and the number of times people need to share information to access services. HIFIS also gives service providers and leaders access to real-time data about demand for services in the homeless-serving sector and capacity to meet this need. Communities can use this information to support system planning and data-driven decision-making related to:

* strategies to accelerate progress with reaching community-level outcomes;
* investment planning to close gaps in the system for those who are currently underserved; and,
* performance management.

HIFIS can also be used to support day-to-day operations, including case management, data collection, and reporting needs.

For more information about [HIFIS](https://www.canada.ca/en/employment-social-development/programs/homelessness/hifis.html), see the HIFIS Toolkit on the Homelessness Learning Hub: [Implementation Guide](https://www.homelessnesslearninghub.ca/library/resources/hifis-implementation-guide), [Installation Guide](https://www.homelessnesslearninghub.ca/library/resources/hifis-installation-guide), [Configuration Guide](https://www.homelessnesslearninghub.ca/library/resources/hifis-configuration-guide) and [User Guide](https://www.homelessnesslearninghub.ca/library/resources/hifis-user-guide).

**What is a Unique Identifier List (List)?**

A List is an unduplicated list of people experiencing homelessness within a geographic area who have connected with the Coordinated Access system in some way. A List has four minimum characteristics:

* unduplicated information for each individual and family;
* generated from one document/database (like HIFIS);
* only includes people experiencing homelessness who are engaged in service (active); and,
* only includes information about people that have given consent to be on the List.

While the List does not need to identify individuals or families by name, there must be a way to eliminate duplication in reporting. Although the identifier is most often a name, it can also be another factor that is unique to each person or family (e.g., a number such as the HIFIS ID) or include a combination of both names and other unique identifiers.

The List makes it possible to:

* know if everyone experiencing homelessness is being appropriately served;
* know where gaps in access points might exist;
* know which resources are needed to help people exit homelessness; and,
* measure, monitor and share progress with reductions in homelessness, including community-level outcome data for the Reaching Home Community Homelessness Report.

The List can also show which clients have moved through these steps and secured a housing unit. This can signal a change in service planning, where the focus shifts to housing set-up and arranging for appropriate supports after move-in. Finally, data from the List is useful for showing which clients are eligible for housing, subsidies or supports from the Coordinated Access Resource Inventory, allowing for more effective and efficient matching when vacancies become available.

HIFIS has the ability to develop a List based on existing information in the system. Access to generate and/or export the List is dependant on having the required user rights. The List in HIFIS consists of a subset of all clients in the database that have consented, are recently active in the system (based on the inactivity policy) and are currently experiencing homelessness (based on an active shelter stay or data in the Housing History module).

**Did you know?** A comprehensive List is a tool that helps communities begin the process of driving chronic homelessness to functional zero and ensuring that homelessness overall is **rare, brief and non-recurring**. The information shows how the system is working: Is it meeting demands for service? Are some groups over or under represented in the homeless population? Is the prioritization policy supporting the goals that the community has set for itself? These are just some of the questions that can be answered by comparing community-level data over time using a List.

**TIP**

HIFIS users can sort and filter client information from the List to support next steps in the Coordinated Access process. For example, data from the List can show which clients are still working to replace their identification, secure benefits or begin a housing search, which helps to clarify the next steps in a housing plan.

For more information about the List, see the [Reaching Home Community Homelessness Report Reference Guide](https://www.homelessnesslearninghub.ca/library/resources/reaching-home-community-homelessness-report-reporting-tools) and the HIFIS Release 59 tools ([Reference Guide](https://www.homelessnesslearninghub.ca/library/resources/hifis-release-40591-reference-guide) and [Frequently Asked Questions](https://www.homelessnesslearninghub.ca/library/resources/hifis-release-40591-frequently-asked-questions)) on the Homelessness Learning Hub.

# BC Community Entities: The Path Forward

This section of the guide is only for CEs that receive funding through the DC stream in BC. It covers the following key messages:

1. Immediate next steps;
2. Potential scenarios; and,
3. Moving forward with implementation of Coordinated Access and HIFIS in BC.

**A. Immediate Next Steps**

As discussed during Trilateral Working Group engagements over 2020-21, next steps for CEs are as follows:

1. Complete the BC Questionnaire (**Annex A**). Refer to the System Mapping Guide, use the System Mapping Tool, and ask for help from:
* The Canadian Alliance to End Homelessness (CAEH);
* ACRE Consulting; and,
* Service Canada and the Homelessness Policy Directorate (HPD).
* **Note:** Only results from the 15 “Essential” questions in the System Mapping Tool are needed for the BC Questionnaire.
1. Once the BC Questionnaire is complete, share it with Service Canada and HPD.
2. Once the completed BC Questionnaire is received by Service Canada and HPD, CEs will receive an email within five business days that either:
* Requests further information; or,
* Invites the CE to a bilateral meeting to discuss the BC Questionnaire with ESDC officials.
1. At the bilateral meeting, CEs will discuss their completed BC Questionnaire. ESDC and the CE will agree on next steps, including:
* Granting a community-specific HIFIS license (if required);
* Additional supports needed from ESDC officials (as appropriate); and/or,
* Further engagement with BC Housing (as appropriate).

Quarterly calls will be held with Trilateral Working Group members to share updates, reflect on processes and problem-solve as appropriate.

**B. Potential Scenarios**

Broadly speaking, there are three scenarios in which BC CEs may find themselves.

*Scenario 1*

In Scenario 1, based on the BC Questionnaire results and discussions with provincial and federal partners, CEs find:

1. That all of the providers that need to use HIFIS are already using BC Housing’s HIFIS
2. **OR** that all of the providers that need to use HIFIS can potentially use BC Housing’s HIFIS because:
	1. They are either an outreach or shelter provider
	2. **AND** they are funded by BC Housing or Reaching Home
	3. **AND** the user rights that BC Housing is able to offer will meet their data and information management needs and will meet their needs specific to Coordinated Access
3. **AND** the CE can provide the necessary resources to support BC Housing with onboarding all of the providers that are not already using its HIFIS installation
4. **AND** the CE can provide the necessary resources to support BC Housing with meeting the CE’s data and information management needs (e.g., modifying user rights, providing timely access to data and/or reports) and needs specific to Coordinated Access
5. **AND** there is no other reason why the CE does not want their providers to use BC Housing’s HIFIS

In Scenario 1, there is likely no need for a DC-specific HIFIS license, as illustrated in **Figure 1** below.

**Figure 1.** Total overlap between CE’s providers’ need for HIFIS and use of BC Housing’s HIFIS.

Providers that are using or will use BC Housing’s HIFIS

CE’s providers that need to use HIFIS

*Scenario 2*

In Scenario 2, based on the BC Questionnaire results and discussions with provincial and federal partners, CEs find:

1. Thatnone of the providers that need to use HIFIS can use BC Housing’s HIFIS because:
	1. They are not an outreach or a shelter provider
	2. **OR** they are not funded by either BC Housing or Reaching Home
	3. **OR** the user rights that BC Housing is able to offer will not meet their data and information management needs and/or will not meet their needs specific to Coordinated Access
2. **OR** the CE cannot provide the necessary resources to support BC Housing with onboarding all of the providers that are not already using its HIFIS installation;
3. **OR** the CE cannot provide the necessary resources to support BC Housing with meeting the CE’s data and information management needs (e.g., modifying user rights, providing timely access to data and/or reports) and/or needs specific to Coordinated Access
4. **OR** there is another reason why the CE does not want their providers to use BC Housing’s HIFIS

In Scenario 2, there is likely a need for a DC-specific HIFIS license, as illustrated in **Figure 2** below.

**Figure 2.** No overlap between CE’s providers’ need for HIFIS and use of BC Housing’s HIFIS.

Providers that can use BC Housing’s HIFIS

CE’s providers that need to use HIFIS

*Scenario 3*

In Scenario 3, based on the BC Questionnaire results and discussions with provincial and federal partners, CEs find:

1. That some of the providers that need to use HIFIS are already using BC Housing’s HIFIS but also need to use a DC-specific HIFIS because:
	1. The CE cannot provide the necessary resources to support BC Housing with meeting the CE’s data and information management needs (e.g., modifying user rights, providing timely access to data and/or reports) and/or needs specific to Coordinated Access
	2. **OR** there is another reason why the CE does not want their providers to use only BC Housing’s HIFIS
2. **AND** that some of the providers that need to use HIFIS cannot use BC Housing’s HIFIS because:
	1. They are not an outreach or a shelter provider
	2. **OR** they are not funded by either BC Housing or Reaching Home
	3. **OR** the user rights that BC Housing is able to offer will not meet their data and information management needs and/or will not meet their needs specific to Coordinated Access
3. **OR** the CE cannot provide the necessary resources to support BC Housing with onboarding all of the providers that are not already using its HIFIS installation
4. **OR** the CE cannot provide the necessary resources to support BC Housing with meeting the CE’s data and information management needs (e.g., modifying user rights, providing timely access to data and/or reports) and/or needs specific to Coordinated Access
5. **OR** there is another reason why the CE does not want their providers to use BC Housing’s HIFIS

In Scenario 3, there is likely a need for a DC-specific HIFIS license, with some providers using both BC Housing’s HIFIS and the DC-specific HIFIS, as illustrated in **Figure 3** below.

**Figure 3.** Some provider-level overlap between use of DC-specific HIFIS and BC Housing’s HIFIS.

Providers that will use the CE’s HIFIS

Providers that use or will use BC Housing’s HIFIS

Providers that will use both

**C.** **Moving forward with implementation of Coordinated Access and HIFIS in BC**

Next steps are dependent on scenario planning, as outlined below.

*Scenario 1*

*If the decision is to move forward with on-boarding providers to BC Housing’s HIFIS:*

1. CEs can establish local Coordinated Access governance group(s);
2. CEs can establish some form of shared governance with BC Housing on the use of HIFIS now and in the future;
3. CEs can provide BC Housing with the necessary resources (e.g., time, funding) to support the process of updating user rights for current HIFIS users, if necessary;
4. CEs can provide BC Housing with the necessary resources (e.g., time, funding) to support the process of on-boarding new providers; and,
5. Updates on progress and lessons learned shared with the Trilateral Working Group.

In addition to supporting the system mapping process (as identified under “immediate next steps” above), ACRE Consulting can also:

* Help CEs to ensure that they can meet their data and information management needs, including any user rights updates that may be required; and/or
* Assist with the on-boarding process of new providers.

*Scenario 2 and 3*

*If the decision is to grant a community-specific HIFIS license:*

1. CEs can establish local Coordinated Access and HIFIS governance group(s);
2. CEs can request a HIFIS license from the ESDC HIFIS team and be supported with next steps (e.g., installation, configuration and deployment);
3. CEs can move forward with implementing their plan for supporting service coordination and data integrity, as outlined in their BC Questionnaire; and,
4. Updates on progress and lessons learned shared with the Trilateral Working Group.

In addition to supporting the system mapping process (as identified under “immediate next steps” above), ACRE Consulting can also:

* Help CEs with HIFIS configuration, including generating user rights templates;
* Assist with the on-boarding process; and/or,
* Assist with problem solving to support service coordination and data integrity.

**Note:** In all three scenarios, CEs are encouraged to work closely with provincial partners to support further alignment between the local Coordinated Access system and BC Housing’s Coordinated Access and Assessment (CAA) initiative.

# Part A: Introduction to System Mapping and the Guide

## Introduction to System Mapping

This section of the guide describes the system mapping process. It also explains the relationship between system mapping and Coordinated Access, HIFIS and the List.

### What is the system mapping process?

System mapping is the *process* of developing a comprehensive understanding of the local network of community services by documenting *which* organizations are offering *what* to *whom* and *why*. With this information, communities can work to strengthen existing partnerships and build new ones, with the goal of supporting greater collective impact for the people the system is designed to serve.

**Did you know?** Providers that fill vacancies from the List are part of the Coordinated Access Resource Inventory. Communities will need a policy or protocol that explains how eligible clients from the List are matched with and prioritized for vacancies from the Coordinated Access Resource Inventory. This information is mapped in Part 6 of the System Mapping Tool.

**TIP**

As illustrated in **Figure 4**, service systems in a community are inter-dependent. While the housing and homelessness response system has a core mandate to address homelessness, it is nested within other service systems that also play a role.

**Figure 4.** Nested service systems that address homelessness.

System mapping for planning the implementation of Coordinated Access and HIFIS is the *process* of documenting which community resources are part of the housing and homelessness response system and how these resources can be organized to support a more coordinated service delivery approach. Through the mapping process, similarities and differences between service providers are clarified and roles in the system are agreed upon. This informs the development of Coordinated Access policies and protocols, and helps streamline configuration of HIFIS.

This guide outlines the steps for system mapping related to the planning and implementation of Coordinated Access and HIFIS, as outlined below.

**Step 1:** **Map the Local Housing and Homelessness Response System.** Identify and describe the service providers that help people experiencing or at-risk of homelessness with their housing challenges. Use the System Mapping Tool to list the providers and describe the services they offer clients.

**Step 2:** **Map the Coordinated Access System.** Identify and describe the Coordinated Access workflow for the housing and homelessness response system. Each service provider will fulfill one or more of the following Coordinated Access roles: **a)** refer to an access point, **b)** serve as an access point, **c)** support clients through triage and assessment (service planning), **d)** match clients to vacancies and/or support referrals (service planning), and/or **e)** fill vacancies through Coordinated Access. Use the System Mapping Tool to identify the role each service provider plays and their participation in Coordinated Access governance.

**Step 3:** **Map HIFIS Configuration.** Identify how HIFIS will be configured to support the needs of Coordinated Access and service providers through the creation of common user rights templates.

Using the System Mapping Tool, identify the modules, sub-modules and transaction fields that HIFIS users need to access to do their job. This is based on: **a)** their Coordinated Access workflow role, **b)** their service provider type, **c)** how their data contributes to reporting requirements and/or **d)** other administrative and operational roles (not direct service to clients).

User rights templates identify the level of access HIFIS users require (e.g., to add, edit or delete transactions) and which data they can access from other HIFIS Service Providers.

An illustration of these steps is provided in **Figure 5** below.

**Figure 5.** Illustration of steps to plan for Coordinated Access and HIFIS configuration.

**Planning for Coordinated Access and HIFIS Configuration**

### System mapping and Coordinated Access implementation

Before Coordinated Access has been implemented in a community, providers may be well connected with each other and share client referrals quite frequently, but the service delivery system as a whole is not yet formally coordinated. For example, while there may be some level of governance in the homeless-serving sector, groups may not be representative of the full range of service providers and discussions may be focused more on specific issues (like shelter use or encampments), rather than longer-term community-level trends and strategies (e.g., monitoring and addressing inflows to homelessness).

Coordinated Access is a change process that introduces new policies and protocols for service providers, with the goal of creating a more integrated service path for clients as well as the ability to track real-time community-level trends. Some of the changes introduced through Coordinated Access include clear access points to service, a common approach to triage and assessment, prioritization criteria for housing resources in the Coordinated Access Resource Inventory, and a common process for matching and referral of clients to vacancies when they become available.

With a Coordinated Access workflow in place, the housing and homelessness response system shifts from an *informal* network of providers to a more *structured* service delivery system. The first two steps of system mapping support this shift:

* In Step 1, the goal is to describe the service providers in the housing and homelessness response system generally (not the roles they play in the Coordinated Access system).
* In Step 2, discussions focus less on understanding the needs of *individual* service providers and more on understanding how these providers will *work together* to prevent and reduce homelessness as a cohesive Coordinated Access system.

This shift is illustrated in **Figure 6** below.

**Figure 6.** Moving towards a systems-based approach with Coordinated Access.

The benefits of adopting a more coordinated, systems-based approach to service delivery are outlined below:

* **Reduced duplication of effort for clients** (e.g., not having to repeat their story to access similar resources across the community);
* **Reduced duplication of effort for workers** (e.g., building on a service plan with other providers helping the same clients and sharing data through the List);
* **Reduced fragmentation in the matching and referral process** (e.g., streamlining different processes, aligning policies and protocols, and ensuring clients are considered for the widest range of vacancies possible); and,
* **Reduced fragmentation of data** (e.g., for the List, annual results reporting, and community-level outcome reporting).

More specifically, the goal in Step 2 is to describe the Coordinated Access workflow by identifying which providers have agreed to fulfill the roles described in **Table 1** below.

**Table 1.** Coordinated Access workflow roles.

|  |
| --- |
| **Role: Refer to Access Point(s)** |
| **Scope of Activities** | **Impact on HIFIS Configuration** |
| Refer people experiencing or at-risk of homelessness to the Coordinated Access system so they can be served appropriately.Protocols may identify any documentation that needs to accompany client referrals. | Service providers making referrals to the Coordinated Access system likely do not need direct access to HIFIS. Clients experiencing homelessness are included in the List when they are served by a provider fulfilling another Coordinated Access workflow role (see options below). |
| **Role: Serve as an Access Point** |
| **Scope of Activities** | **Impact on HIFIS Configuration** |
| Access points may focus their activities on intake and referrals to service providers in the homeless-serving sector and beyond. Alternatively, access points may engage further with clients, for example by complementing access-related services with homelessness prevention or shelter diversion supports.Access points follow an intake protocol and begin the triage and assessment process. | Access points may be configured as a either: **a)** a HIFIS Service Provider that only offers access-related services or **b)** a HIFIS Service Provider that offers access-related services and other types of services.Service providers follow an intake protocol for entering new clients and documenting transactions in HIFIS.At minimum, providers will require user rights to add new clients and maintain the List (e.g., add transactions to keep a client active and confirm accuracy of Housing History). They may also need to upload documents that accompany client referrals. |
| **Role: Support Clients through Triage and Assessment (Service Planning)** |
| **Scope of Activities** | **Impact on HIFIS Configuration** |
| Homeless-serving providers (e.g., prevention and diversion, shelters, street outreach) can collaborate to help clients find and secure housing. Some communities may have dedicated roles for helping clients with their housing plans (e.g., service navigators or housing liaisons). | Homeless-serving providers add triage and assessment transactions to maintain/update the List (e.g., to keep a client active, confirm accuracy of Housing History and other client information). Transactions can be more operational, such as shelter use and related services (e.g., book-ins and case management).Referrals can be tracked, both to other HIFIS Service Providers and beyond. |
| **Role: Match Clients to Vacancies and/or Support Referrals (Service Planning)** |
| **Scope of Activities** | **Impact on HIFIS Configuration** |
| When a vacancy becomes available, this role supports the matching and referral process. This often includes case conferencing to agree on which client(s) will be referred to the provider for an offer. It is typically an administrative role, not direct service.Coordinated Access can support referrals to housing resources in the Coordinated Access Resource Inventory and those outside the housing and homelessness response system (e.g., private market or disability and health care sectors). | When a vacancy becomes available, HIFIS allows the List to be filtered so that only eligible clients are considered for an offer. The List can then be sorted based on prioritization criteria (established as part of Coordinated Access governance), identifying the clients that should be offered a vacancy before others on the List. Ideally, these data are included in the List, so that no additional information is needed for case conferencing. The List can be exported out of HIFIS; exports include more data points than the Coordinated Access module displays. Real-time data entry is required to keep the List current. If data in the List is accessed directly, specific user rights will be required.  |
| **Role: Fill vacancies through Coordinated Access** |
| **Scope of Activities** | **Impact on HIFIS Configuration** |
| As noted above, a range of providers can fill vacancies using the List, including those with resources committed to the Coordinated Access Resource Inventory as well as private market landlords and providers from other systems. | The List needs to be updated throughout the vacancy matching and referral process (e.g., documenting the status/outcome of offers and adding new Housing History records after move-in).If providers that fill vacancies from the List need direct access to client information in HIFIS, they will need user rights (e.g., to indicate when a client has moved-in). |

There are various ways to approach the community-based discussions that inform system mapping activities related to Coordinated Access. For example, communities may wish to start by engaging with their service providers about how their work is similar or different from each other. More specifically, communities could begin with a conversation about shelter and explore topics such as:

* How aligned are shelters with each other across the community (e.g., their policies and protocols, eligibility criteria, use of service planning templates, and reporting needs)?
* Do local shelters serve common clients? If so, how is information shared?
* Do local shelters take a similar approach to service planning and data entry?

Communities may choose to engage with shelters individually, as a group, or both.

Regardless of the approach that is taken, the end goal remains the same: to confirm which Coordinated Access workflow role(s) providers will fulfill and the HIFIS user rights that staff will require to support this work. As explained further in Step 3, user rights will need to accommodate other data and information management needs beyond the Coordinated Access workflow (e.g., those specific to each type or group of service provider as well as individual organizations). In general, the goal for Step 3 should be to streamline the use of HIFIS and limit the number of individualized templates, where possible.

The Homelessness Policy Directorate of ESDC is consulting on this draft System Mapping Guide over the spring and summer 2021. As part of this review, communities will be invited to share information about how they approached system mapping to support Coordinated Access implementation. This information will be used to develop case studies and additional guidance.

**TIP**

To illustrate how the various system mapping components explored in Step 2 fit together, see **Table 2**. The purpose of this table is to show how the six homeless-serving provider types fit with each Coordinated Access workflow role described earlier in **Table 1**. Communities may wish to use **Table 2** as a template for organizing the results of their Step 2 system mapping activities.

**Table 2.** Mapping service provider types, Coordinated Access workflow roles and scope of services.

|  |  |  |
| --- | --- | --- |
| **Service Provider Types** | **Coordinated Access Workflow Roles** | **Scope of Services** |
| Refer to Access Point(s) | Access Point | Fill Vacancies through Coordinated Access | Focus of Service Planning | Services and Stays? |
| **1** | **Access Point** (Intake & Referrals) | N/A | **YES** | NO | Triage/ Assessment | Services Only |
| **2** | **Prevention/ Diversion** | Optional | Optional | NO | Triage/ Assessment + Service Plans | Services Only |
| **3** | **Street Outreach** | Optional | Optional | NO | Triage/ Assessment | Services Only |
| **4** | **Day Centre/ Drop-in** | Optional | Optional | NO | Triage/ Assessment + Service Plans | Services Only |
| **5** | **Emergency Shelter** | Optional | Optional | NO | Triage/ Assessment + Service Plans | Services and Stays  |
| **6** | **Violence Against Women Shelter** | Optional | Optional | NO | Triage/ Assessment + Service Plans | Services and Stays |

###

### System mapping and the List

Coordinated Access introduces a new, collective responsibility for maintaining a quality List, which provides real-time data about community-level trends (e.g., homelessness counts, and inflows to and outflows from homelessness). This makes it possible to transition from client information being tracked manually (in one or more Excel spreadsheets, for example) to having a List of clients that is automatically generated and updated in a HMIS like HIFIS. **Figure 7** illustrates the evolution to a more dynamic approach to data collection and reporting in the homeless-serving sector.

**Figure 7.** Moving towards a dynamic data collection and reporting approach.

To have a *comprehensive* List, all of the providers that serve people experiencing homelessness need to participate in Coordinated Access and support real-time updates to the List as part of their regular service planning practices. The most efficient way to accomplish this is for these providers to use the same HIFIS installation in a single, shared cluster. If this is not possible, communities will need to develop a policy or protocol that explains how providers outside of HIFIS or those using a different installation, or the same installation in different clusters, will support timely updates for a single, community-level List. This will ensure that everyone who is experiencing homelessness that has connected to an access point is included in the Coordinated Access system.

Sufficient user rights are required for HIFIS users to be able to enter data for the List, generate the List and export data for further processing.

### System mapping and HIFIS implementation

Service providers can use HIFIS to fulfill their roles in the Coordinated Access system and meet their operational needs for data and information management. In Step 3 of system mapping, communities gather information that helps them to describe how these needs will be met for each provider and their funders, including the Reaching Home CE.

Communities that have not yet implemented Coordinated Access may have deployed HIFIS using a different decision-making process than what is proposed in this guide, which is intended to support the shift toward more coordinated information management. For example, HIFIS Leads may have configured HIFIS with many clusters and user rights that focus *exclusively* on meeting service providers’ data collection and reporting needs as individual operators. There may be limited data sharing, even between providers that serve the same clients and are working toward common goals.

HIFIS configuration that aligns with a Coordinated Access workflow puts less focus on *individual service provider user rights* and more focus on common *user right templates*. This creates an opportunity to streamline the use of HIFIS across many providers, based on the type of services they provide and the role they play in the Coordinated Access system (as illustrated in **Table 2**). It also helps to show which providers may be serving the same clients and, as such, where data and information sharing may be most beneficial (e.g., to help clients by building on the same service plans).

The Homelessness Policy Directorate of ESDC is consulting on this draft System Mapping Guide over the spring and summer 2021. As part of this review, communities will be invited to share information about how they approached system mapping to support HIFIS implementation. This information will be used to develop case studies and additional guidance.

**TIP**

With common user rights in place, use of HIFIS shifts from an individualized, fragmented database environment (similar to HIFIS 3) to one in which multiple service providers in the same community can collaborate more efficiently when serving common clients (the intent of HIFIS 4). This shift makes it possible to leverage providers’ respective data collection efforts, make more informed decisions, and serve clients more efficiently and effectively.

The evolution of this coordinated approach to information management is illustrated in **Figure 8** below.

**Figure 8.** Moving towards a coordinated data and information management.

More specifically, step 3 allows communities to take the results from Step 1 and 2 to determine how HIFIS can meet the specific data and information needs of their:

* Service providers in the local housing and homelessness response system;
* Coordinated Access system;
* Reporting obligations; and,
* Other operational or administrative responsibilities.

There are five main elements when configuring HIFIS:

* HIFIS Service Providers;
* HIFIS Program;
* User Rights;
* Mandatory data fields; and,
* Look-up tables (i.e. drop down menus).

Further details on the implementation and configuration of HIFIS can be found in the [HIFIS Implementation Guide](https://www.homelessnesslearninghub.ca/library/resources/hifis-implementation-guide) of the HIFIS Toolkit.

## System Mapping Guide and Tool

This section describes the System Mapping Guide and how to complete the System Mapping Tool. It also provides an overview of how communities can use their system mapping results to inform their plans for Coordinated Access and HIFIS configuration, including their ability to generate a comprehensive List.

### Overview

The System Mapping Guide provides guidance for the system mapping process, including an overview of activities, questions for service providers (**Annex B**), and a glossary of terms (**Annex C**).

The guide comes with a tool that can help communities to document the information gathered from service providers called the System Mapping Tool. **Table 3** below provides an overview of the 25 questions in the tool. Note that all of these questions are for service providers that engage directly with clients, play a role in the Coordinated Access system and/or use HIFIS.

CAEH was consulted during the development of these system mapping resources, which complement the CAEH suite of tools. The CAEH workbook is an Excel-based tool with several tools: a community profile called About Your Community, the By-Name List Scorecard, the Coordinated Access Scorecard and the Provider Participation Tool (PPT). Questions in the System Mapping Tool that correspond with the PPT have been cross-referenced in **Table 3** and in **Annex B**.

Note that, while all of the PPT questions are included in the System Mapping Tool, the PPT tab of the CAEH workbook is used to generate some of the scorecard answers. If communities are completing the System Mapping Tool instead of the PPT, they may wish to copy information from the System Mapping Tool into these PPT fields to benefit from this automated feature.

The System Mapping Tool is available to all communities and can be adapted to meet the needs of their local context. It has three tabs.

1. **“BC Questionnaire”** includes the six questions from Annex A.
2. **“Start Map Here”** includes 25 questions and response options from Annex B.
3. **“Map User Rights”** is for determining specific HIFIS business needs and mapping user rights templates, based on the information in the “Start Map Here” tab and local governance decisions.

**Note for BC CEs:** Only the 15 “Essential” questions are needed for the BC Questionnaire. See **Annex A** for a list of these questions.

**Table 3.** Overview of System Mapping Tool questions.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **System Mapping Tool Questions** | **Step 1** | **Step 2** | **Step 3** | **Totals** |
| *\* shared with CAEH Provider Participation Tool* |
| **Part 1:**General Information | Who the providers are, if they are Indigenous-led, and areas served | **E1\***, **E2\***, **E3\***, **E4**, O1\* | - | - | **5** |
| **Part 2:**Policy Direction | How the provider is funded, primary mandate, and eligibility for service | **E5\***,O2\*, O3, O4\*, O5\* | - | - | **5** |
| **Part 3:**Service Description | What services are offered and capacity to serve | **E6**,O6, O7 | - | - | **3** |
| **Part 4:**Coordinated Access System | Governance and Coordinated Access workflow roles | - | **E7**, **E8\*** | - | **2** |
| **Part 5:**Shared Service Planning | Approach to serving common clients and using common tools | - | **E9\*** | - | **1** |
| **Part 6:**Vacancy Matching and Referral Processes | Decision-making about approach to filling vacancies and related protocols | - | **E10**, **E11\*, E12**,O8 | - | **4** |
| **Part 7:**Data and Information Management | How data and information management needs are/will be met and related considerations | - | - | **E13\***, **E14, E15**,O9, O10 | **5** |
| **Part 8:**HIFIS User Rights Templates  | How HIFIS will be configured |  |  | See “Map User Rights” Tab |  |
|  | **13** | **7** | **5** | **25** |

### System mapping in phases

Communities may wish to complete their system mapping incrementally using a phased approach, as described in the example below.

**First Phase: Complete some of the questions using existing information.**

Communities may start the process by filling in the questions in the “Start Map Here” tab using existing data sources, either in the public domain (e.g., [National Service Provider List](https://open.canada.ca/data/en/dataset/7e0189e3-8595-4e62-a4e9-4fed6f265e10), 211 or HelpSeeker) or that have otherwise been made available (e.g., [Built for Zero change package](https://changepackage.bfzcanada.ca/?password-protected=login&redirect_to=https%3A%2F%2Fchangepackage.bfzcanada.ca%2F), Reaching Home sub-project agreements if the CE is completing the tool).

Pre-populating the tool before engaging directly with service providers ensures that existing tools are leveraged, saves time, and allows for cross-referencing. Efforts should be made to correct inaccuracies as part of the system mapping process. Doing so will ensure that information about services available to people experiencing or at-risk of homelessness in a community is consistent across all publicly available sources of information.

**Second Phase: Meet with service providers to complete the “Start Here” tab.**

As explained earlier, there is no “one size fits all” approach to system mapping. Validating and completing the tool will take time. Communities should develop the processes that work for them, given their local context.

**Third Phase: HIFIS configuration may require additional planning efforts.**

The work to complete the second tab, “Map User Rights” should also be pre-populated before engaging directly with service providers, based on the decisions that have been made with local governance groups (e.g., Coordinated Access workflow protocols, agreements with providers that outline the services they are funded to offer, and HIFIS policies and protocols).

The System Mapping Tool provides some suggestions for typical user right templates, for consideration.

At the end of the third phase, communities should know the data and information needs of their service providers and Coordinated Access workflow roles.

### Using the system mapping results

As identified in the introduction, the objective of system mapping is to develop a comprehensive understanding of local community services. Once a community has mapped their local system, they can use this information to strengthen existing partnerships and develop new ones, with the goal of reinforcing a common agenda for preventing and reducing homelessness with the province, local municipality and other partners. System mapping results provide data to support these conversations.

Communities can also use the information to refine existing Coordinated Access policies and protocols or create new ones. Some examples of these next steps are outlined below.

The Homelessness Policy Directorate of ESDC is consulting on this draft System Mapping Guide over the spring and summer 2021. As part of this review, communities will be invited to share information about how system mapping results were used and how they are maintained. This information will be used to develop case studies and additional guidance.

**TIP**

* **Intake protocol:** Streamlining intake processes across the Coordinated Access system helps to ensure that clients do not need to repeat their stories or answer different questions to access similar services across the homeless-serving sector. System mapping confirms which providers should be following the common intake protocol as access points. It also shows opportunities to improve consistency in service delivery between providers of similar service types (e.g., all shelters or all outreach).
* **Triage and assessment protocols:** Doing the up-front work of integrating eligibility and prioritization questions into a common triage and assessment process helps to ensure that all of the information that providers need to fill their vacancies is readily available. This helps support more effective and timely referrals. System mapping confirms the specific eligibility and prioritization criteria that can be included in these common triage and assessment protocols.
* **Communication tools:** It is important that providers agree to keep promotional materials up-to-date and aligned with messaging used elsewhere about the Coordinated Access system. System mapping confirms where information about services available is publicly available and offers the opportunity to reinforce the expectation for clear and consistent messaging.

Finally, communities may wish to identify which role(s) will be responsible for keeping the system map up to date. This role could be responsible for updating the information on a regular basis and ensuring that changes are reflected across all public sources, for example.

# Part B: The System Mapping Tool

## Step 1: Map Housing and Homelessness Response System

### Scope of activities

* Identify and list the service providers that help people experiencing or at-risk of homelessness with their housing challenges.
* Describe the activities and services they offer clients.
* Use existing data sources (e.g., online directories like 211) or collect information directly from organizations (e.g., through surveys or interviews).
* Consider beginning with service providers with a primary mandate to serve people experiencing homelessness (e.g., shelters or outreach) and/or dedicated funding to address homelessness (e.g., through Reaching Home) as well as providers that would like to use HIFIS in the near future.

### Part 1: General Information

Part 1 has five questions, four that are Essential (E1, E2, E3 and E4) and one as Optional (O1).

**[E1]** Organization name

**[E2]** Service provider/program name

**[E3]** Indigenous service provider

**[E4]** Service location(s)

**[O1]** Veteran service provider

Additional context and prompts are outlined below for each question.

**[E1] What is the organization name?**

* Mapping should focus on the organizations that are funded to provide services for people experiencing or at-risk of homelessness in the community.
	+ Typically, these organizations are “agreement holders” with funders that have allocated investments to address housing and homelessness issues (e.g., Reaching Home funds Community Entities, who then fund organizations to deliver one or more sub-projects).
	+ Communities may wish to expand on this question and include contact information for the organization. Details should align with information found elsewhere (e.g., 211).

**[E2] What is the service provider/program name?**

* What programs or services are offered by the organizations listed in **E1**?
* The provider name in **E2** is typically how the service or program is known by clients in the community.
* In some cases, a service provider/program name is the same as the name of the organization (e.g., if the organization only offers one sub-project or program).
* Organizations may also have more than one service provider. For example, if two Reaching Home sub-projects are led by the same organization, then that organization would have two “service providers” (sometimes referred to as “programs”) under their responsibility.
* How providers are identified in HIFIS can be the same or different than how they are identified in **[E2]**. For example, providers can use the same name and be configured as a single HIFIS Service Provider (e.g., Grandview Youth Outreach) or they can be bundled as a “team” with other providers (e.g., a HIFIS Service Provider called Grandview Outreach Network that includes services provided by two outreach service providers).
* Communities may wish to expand on this question and include contact information for the service provider/program. Details should align with information found elsewhere (e.g., 211).

**[E3] Is the service provider an Indigenous organization?**

* To identify additional considerations for Coordinated Access and use of HIFIS, see Question **[E15]**.

**[E4] Where are services located?**

* Another way to ask this question is where do clients access services in the community?
* Communities may wish to tailor the response options to this question (e.g., entire Reaching Home Designated Community, municipality, or core urban area).
* For communities funded through the Reaching Home Designated Communities stream, providers may serve a smaller area, but access points must serve the entire Designated Community geographic area (i.e., the local Census Metropolitan Area or equivalent).
* Filters can be set-up in HIFIS using the geo-region data field for reporting and the List (note that this filter is a future enhancement for the List).
* Communities may wish to expand on this question and include addresses (e.g., main office for services that are portable or specific building for housing units) with staff contacts for receiving referrals. Details should align with information found elsewhere (e.g., 211).

**[O1] Is the provider a veteran-serving organization?**

* A veteran-serving organization refers to providers that have a primary purpose and/or receive funding to serve veterans (e.g., Royal Canadian Legion or a [local Veterans Affairs Canada office](https://www.veterans.gc.ca/eng/contact#details-panel1)).

### Part 2: Policy Direction

Part 2 has five questions, one that is Essential (E5) and four as Optional (O2, O3, O4 and O5).

**[E5]** Provincial and federal funding

1. BC Housing
2. Reaching Home DC
3. Reaching Home IH
4. Funding notes, if any

**[O2]** Other funders

1. Municipal
2. Health
3. Other source(s)
4. Funding notes, if any

**[O3]** Percentage of costs covered by funding sources

1. Municipal
2. BC Housing
3. Reaching Home DC
4. Reaching Home IH
5. Health
6. Other source(s)

**[O4]** Primary mandate to serve

1. Housing and Homelessness Response System
2. Other Service System

**[O5]** Who can be served (eligibility)

1. Homeless clients
2. Housed clients
3. Eligibility criteria
4. Is criteria documented
5. Will eligibility be verified by the provider before an offer is made
6. If yes to **[O5e]**, describe: when and how

Additional context and prompts are outlined below for each question.

**[E5] Is the provider funded by BC Housing and/or Reaching Home?**

* Providers may receive provincial and/or federal funding.
* In some situations, providers are also funding administrators (e.g., a Community Entity that provides direct client service).
* This information helps to confirm any policy implications related to Coordinated Access and use of HIFIS. For example, in the BC provincial context, is the provider required to use HIFIS for BC Housing’s Coordinated Access and Assessment initiative and/or provincial reporting?
* With respect to participation in Coordinated Access under Reaching Home, providers that are funded through the Designated Communities stream are required to participate and providers that are funded through the Indigenous Homelessness stream are encouraged to participate.
* Given that HIFIS is being used by some providers funded by BC Housing (see **[E13a]**), BC communities with a HIFIS license will need to plan for meeting funder requirements if more than one HIFIS is in use. For example, how will the use of a community-specific HIFIS installation impact reporting requirements, data entry, or staff training needs?
* In a shared database environment, more than one provider enters data on a client file. While it is possible to filter results by provider or funding source (e.g., to isolate specific contributions), depending on how HIFIS is configured, doing so may require use of a HIFIS Program and custom report.
* In the funding notes, it may be helpful to identify if funding is temporary, for example.

**[O2] Is the provider funded by other funding source(s)?**

* For example, is the service provider funded by municipal, health, or other source(s)?
* This information helps to confirm any policy implications related to Coordinated Access or the use of HIFIS. For example, is the provider required to participate in another service system with its own access policies? Is the provider required to use another database? What are the data entry and reporting requirements?
* Similar to the prompts in **[E5]**, given that HIFIS is being used by some providers funded by BC Housing (see **[E13a]**), BC communities with a HIFIS license will need to plan for meeting funder requirements if more than one HIFIS is in use. For example, what additional requirements will impact reporting requirements, data entry, or staff training needs?
* Again, similar to **[E5]**, in a shared database environment, more than one provider enters data on a client file. While it is possible to filter results by provider or funding source (e.g., to isolate specific contributions), depending on how HIFIS is configured, doing so may require use of a HIFIS Program and custom report.
* In the funding notes, it may be helpful to identify if funding is temporary.

**[O3] What is the percentage of costs covered by each funding source?**

* Information in **[O3]** is helpful for calculating proportional allocation of data or results, which is an alternate approach to reporting when more than one funder contributes to a provider in a shared database environment.
* In a shared database environment, more than one provider enters data on a client file. While it is possible to filter results by provider or funding source (e.g., to isolate specific contributions), depending on how HIFIS is configured, doing so may require use of a HIFIS Program and custom report.

**[O4] What is the provider’s primary mandate to serve?**

* “Housing and homelessness response” providers have a primary purpose and/or receive funding to serve the homeless population (e.g., emergency shelters and supportive housing for people with previous experience of homelessness).
* “Other service system” providers serve the homeless population, but it is not their primary purpose (e.g., mental health provider or community health centre).
* Information from **[O4]** can be used to identify inter-sectoral participation in the Coordinated Access system.

**[O5] Who can be served by the provider?**

* There are various ways to describe eligibility. A simplified approach is to ask if the provider serves clients experiencing homelessness and/or clients who are housed.
* Another approach is to document eligibility criteria or minimum admission requirements for service (e.g., a specific gender identity or age range). Further, communities can document if these criteria are verified by the provider after a referral is made and, if so, when and how. For example, if specific documentation will be verified before an offer is made, it is helpful for workers to know about this in advance, so that they can confirm that all of the paperwork is in order. This helps to avoid delays when a provider is ready to fill a vacancy.
* Sometimes it is also helpful to document who is *not* eligible. This increases the transparency of who *can* and *cannot* access services from this provider.
* Ideally, information about eligibility criteria is as specific as possible and is included in the community’s triage and assessment process. This is important for several reasons:
	+ Doing so can ensure that the right information is gathered at the right time to support effective referrals between providers.
	+ Knowing the full process in advance can help workers to predict the help clients may need to move forward with their housing plans.
	+ Given that many programs have waiting lists, it is important to make referrals as efficiently as possible, as early as possible.
* Eligibility details should align with information found elsewhere (e.g., 211).
* **Note:** It is a minimum requirement that eligibility requirements are documented for housing resources funded by the Reaching Home Designated Communities stream.

### Part 3: Service Description

Part 3 has three questions, one that is Essential (E6) and two as Optional (O6 and O7).

**[E6]** Services offered

1. Primary service type
2. If other in **[E6a]**, describe services
3. Secondary service type
4. If other in **[E6c]**, describe services

**[O6]** Services offered (alternate version)

1. Service navigation
2. Homelessness prevention
3. Shelter diversion
4. Finding and/or securing housing
5. Temporary shelter or housing
6. Permanent housing
7. Subsidize the cost of housing
8. Support to stay housed after move-in
9. Other services

**[O7]** Capacity to…

1. Serve
2. Temporarily shelter/house
3. Permanently house
4. Subsidize (number/amount)
5. Support (after move-in)
6. Other

Additional context and prompts are outlined below for each question.

**[E6] What services are available to clients?**

* What types of services does the whole organization provide?
* Service provider types have been pre-populated to align with the HIFIS set-up options, but communities may also create their own. Service types in HIFIS are:
	+ Access Points;
	+ Prevention/Diversion;
	+ Street Outreach;
	+ Day Centres/Drop Ins;
	+ Emergency Shelters;
	+ Violence Against Women (VAW);
	+ Transitional Housing;
	+ Housing Support;
	+ Supportive Housing; and,
	+ Affordable Housing; and
	+ Other (e.g., Service Navigation/Housing Liaisons).
* Note that service provider types are about roles that provide service to clients, not administrative roles.
* Service descriptions should align with information found elsewhere (e.g., 211).

**[O6] How else can services be described?**

* Another way to map a service is to describe its intent. For example, clients could be helped with:
	+ Service navigation;
	+ Homelessness prevention;
	+ Shelter diversion;
	+ Being sheltered or housed temporarily;
	+ Finding and/or securing housing;
	+ Being housed permanently;
	+ Retaining their housing after move-in; and/or,
	+ Other services.
* This is an alternate question to **E6**, which is useful for communities that may not have defined their service provider types in the same way.

**[O7] What is the provider’s capacity to serve?**

* System mapping includes documenting capacity to serve. Information about capacity informs Coordinated Access strategic planning and impacts inflow/ outflow trends from the List. It also informs HIFIS onboarding plans (e.g., configuration, staff training needs).
* At minimum, it will be important to document capacity to serve in the housing resources that are designated to the Coordinated Access Resource Inventory (see **E11** and **E12**)
* Units of measurement used to calculate total capacity to serve vary and are based on the type of service offered:
	+ **Service-based** providers could document capacity as staffing levels (e.g., number of full-time staff with a worker to client ratio of 1:15 or identifying the maximum caseload of a provider) or available hours (e.g., outreach services available weekdays from noon to 8pm).
	+ **Emergency shelter** capacity could be defined as the number of beds available on a permanent, seasonal or overflow basis. **Transitional housing** providers could document capacity as the number of units or spaces available.
	+ **Housing** providers could document capacity as the number of units or spaces available. They could also identify which units are affordable and which are offered as part of place-based supportive housing programs (housing with supports).
	+ **Subsidy** capacity could be documented as the total number of subsidies available or the amount of funding available overall, for example.
	+ Similar to service-based providers, **housing support** capacity could be documented as staffing levels (e.g., number of full-time case managers with a worker to client ratio of 1:15 or identifying the maximum caseload of a provider).
* Capacity information should align with details found elsewhere (e.g., 211).

## Step 2: Map the Coordinated Access System

### Scope of activities

* Identify and describe the Coordinated Access workflow for the housing and homelessness response system.
* Identify the role each service provider plays and their participation in Coordinated Access governance.
* Decisions about how Coordinated Access will be implemented are led through the local governance group(s).

### Part 4: Coordinated Access System

Part 4 has two Essential questions (E7 and E8).

**[E7]** Governance group membership

1. Coordinated Access group(s)
2. If yes to **[E7a]**, which group(s)

**[E8]** Role(s) in workflow (current or planned)

1. Refer to access point(s)
2. Access point
3. Triage and assessment (service planning)
4. Match clients to vacancies and/or support referrals (service planning)
5. Fill vacancies through Coordinated Access

Additional context and prompts are outlined below for each question.

**[E7] Does the provider participate in governance for Coordinated Access?**

* Governance refers to decision making. Coordinated Access policies and protocols are developed, approved and reinforced through governance groups.
* Mapping participation in Coordinated Access governance clarifies where providers are already engaged in these processes and where connections could be strengthened.
* Membership could reflect status in existing groups or interest in participating in Coordinated Access governance groups that are under development.

**[E8] What role(s) does the provider play in the Coordinated Access workflow?**

* Similar to **[E7]**, roles could reflect the current Coordinated Access workflow or planned future state.
* Roles have been pre-populated to align with the [Reaching Home Coordinated Access Guide](https://www.homelessnesslearninghub.ca/library/resources/reaching-home-coordinated-access-guide), but communities may modify these roles or create their own. See Table 1 in this guide for more information.
* Coordinated Access workflow roles in the System Mapping Tool include:
	+ Refer to access point(s)
	+ Access point
	+ Triage and assessment (service planning)
	+ Match clients to vacancies and/or support referrals (service planning)
	+ Fill vacancies through Coordinated Access
* Roles inform user rights in HIFIS.
* **Note:** It is a minimum requirement that service providers receiving funding through the Reaching Home Designated Communities stream (to deliver one or more projects) participate in Coordinated Access.

### Part 5: Shared Service Planning

Part 5 has one Essential question (E9).

**[E9]** Common clients and common tools

1. Does this provider share clients with those listed in **[E2]**
2. Percentage of local homeless population served by this provider (*best guess*)
3. Percentage of local homeless population that only engages with this provider (*best guess*)
4. Use common triage/assessment tool
5. If yes to **[E9d]**, which tool(s)

Additional context and prompts are outlined below for this question.

**[E9] What is the level of shared service planning happening with other providers?**

* The questions in Part 5 show the overall and unique impact of service providers. This information helps to inform several aspects of Coordinated Access implementation (e.g., the need to develop common triage and assessment processes) and HIFIS configuration (e.g., user right templates). This is particularly true in communities where more than one information management system is in use, given the goal of supporting greater integration in service delivery for clients and improved data quality for reporting.
* There is a higher chance of duplication in effort for clients and workers, as well as reduced data quality, in situations where providers that serve a large volume or proportion of the homeless population are not sharing data with others who may also be serving the same clients.
* Providers in different HIFIS installations or separate clusters creates greater risk of fragmented data, given that data sharing is not possible with this configuration approach.
* The goal is to be able to report on community-level trends, such as inflows into homelessness, outflows from homelessness and outcomes. For more information, see the [Reaching Home Community Homelessness Report Reference Guide](https://www.homelessnesslearninghub.ca/library/resources/reaching-home-community-homelessness-report-reporting-tools) and the HIFIS Release 59 tools ([Reference Guide](https://www.homelessnesslearninghub.ca/library/resources/hifis-release-40591-reference-guide) and [Frequently Asked Questions](https://www.homelessnesslearninghub.ca/library/resources/hifis-release-40591-frequently-asked-questions)) on the Homelessness Learning Hub.
* **Note:** It is a minimum requirement that service providers receiving funding through the Reaching Home Designated Communities stream (to deliver one or more projects) participate in Coordinated Access and use a common assessment tool.

### Part 6: Vacancy Matching and Referral Processes

Part 6 has four questions, three that are Essential (E10, E11 and E12) and one is Optional (O8).

**[E10]** Table Membership

1. BC Housing’s CAA table
2. Local Coordinated Access table(s)
3. If yes to **[E10b]**, which table(s)

**[E11]** DC Coordinated Access Resource Inventory (commitments)

1. Housing units/spaces
2. Housing in **[E11a]** exclusive to DC
3. Subsidies (number and/or amount)
4. Subsidies in **[E11c]** exclusive to DC
5. Support spaces
6. Support spaces in **[E11e]** exclusive to DC
7. Are these commitments documented
8. Vacancy notifications: when and how

**[E12]** BC Housing’s CAA Resource Inventory (commitments)

1. Housing units/spaces
2. Housing in **[E12a]** exclusive to CAA
3. Subsidies (number and/or amount)
4. Subsidies in **[E12c]** exclusive to CAA
5. Support spaces
6. Support spaces in **[E12e]** exclusive to CAA

**[O8]** Prioritization criteria for DC Coordinated Access Resource Inventory

1. Housing
2. Subsidies
3. Support spaces

Additional context and prompts are outlined below for each question.

**[E10] Does the provider participate in vacancy matching and referral processes?**

* Governance groups **[E7]** are responsible for overall decision-making, including developing, approving and reinforcing policies and protocols that support the successful implementation of Coordinated Access.
* To support the vacancy matching and referral process of Coordinated Access, case conferencing tables are often used. For example, vacancies in BC Housing-funded Supportive Housing units are filled through the provincial Coordinated Access and Assessment (CAA) initiative. BC communities may also have local case conferencing tables for filling vacancies in other housing resources that form part of the local Coordinated Access Resource Inventory.
* This information also helps to inform the implementation of Coordinated Access policies and protocols in communities where more than one vacancy matching and referral process is in place for people experiencing homelessness, with the goal of supporting greater integration in service delivery and housing outcomes.
* There is a higher chance of duplication in effort for clients and workers, as well as reduced housing outcomes, in situations where providers are not working together to fill vacancies using a comprehensive List. For example, having two or more data sources for who should be prioritized for vacancies limits the potential impact of having one community-level approach, where clients can be considered for a wide range of options. Having higher quality data supports more appropriate referrals. Moreover, providing clients with a wider range of housing resources to choose from supports better matches and likelihood of positive housing outcomes.

**[E11] Does the provider commit housing resources to the DC Coordinated Access Resource Inventory?**

* The Coordinated Access Resource Inventory includes housing resources such as housing units/spaces, subsidies, and supports.
* Vacancies may be filled exclusively through the DC Coordinated Access system or shared with other processes (e.g., BC Housing’s CAA).
* Resources dedicated to the Coordinated Access Resource Inventory may be all or a portion of total capacity (as documented in **[O6c]**, **[O6d]** and **[O6e]**).
* For greater clarity, it is recommended that commitments to the Coordinated Access Resource Inventory are documented. Communities may also wish to put a protocol in place to clarify how providers can signal that a vacancy is or will become available.
* **Note:** It is a minimum requirement that housing resources funded through the Reaching Home Designated Communities stream (to deliver one or more projects) are included in the Coordinated Access Resource Inventory and fill vacancies using the List.

**[E12] Does the provider commit housing resources to BC Housing’s CAA?**

* The Coordinated Access Resource Inventory includes housing resources such as housing units/spaces, subsidies, and supports.
* Vacancies may be filled exclusively through BC Housing’s CAA or shared with other processes (e.g., Coordinated Access system led by the Reaching Home Community Entity).
* Resources dedicated to BC Housing’s CAA may be all or a portion of total capacity (as documented in **[O6c]**, **[O6d]** and **[O6e]**).

**[O8] What are the prioritization criteria for the housing resources in the Coordinated Access Resource Inventory?**

* Prioritization refers to the resource-specific criteria used to filter eligible clients from the List when a vacancy becomes available. Clients on the List are sorted in rank order, based on these criteria. Clients at the top of the List receive offers before clients at the bottom of the List.
* Prioritization criteria informs user rights.
* **Note:** It is a minimum requirement that housing resources funded through the Reaching Home Designated Communities stream (to deliver one or more projects) are included in the Coordinated Access Resource Inventory and fill vacancies using the List using prioritization.

## Step 3: Map HIFIS Configuration

### Scope of activities

* Identify how HIFIS will be configured, based on the information and data management needs of service providers and their role in the Coordinated Access system.
* Generate HIFIS Service Provider user rights templates to identify the modules, submodules and transactions that HIFIS users will need access to, the level of access they require, and which data they can access in other HIFIS Service Providers.
* Decisions about how HIFIS will be implemented are led through the local governance group(s).

### Part 7: Data/Information Management

This section has five questions, three that are Essential (E13, E14 and E15) and two as Optional (O9 and O10).

**[E13]** Data/information management and related governance

1. Using BC Housing’s HIFIS
2. If not on BC Housing’s HIFIS, how is data collected
3. Member of HIFIS governance group(s)
4. If yes to **[E13c]**, which group(s)

**[E14]** HIFIS implementation plans

1. Need HIFIS
2. Host preference
3. On-boarding priority level
4. On-boarding target month
5. Number of HIFIS users (*best guess*)

**[E15]** Other factors to consider

**[O9]** Use of BC Housing's HIFIS

1. BC Housing’s HIFIS Service Provider name
2. BC Housing’s HIFIS cluster
3. BC Housing’s cluster name (if private)

**[O10]** Data sharing considerations

1. Which providers (or roles) share clients and/or information with this provider
2. How would sharing data help clients and workers
3. Which data would be most helpful to share and why
4. What are the concerns about data sharing
5. Ideas for addressing these concerns

Additional context and prompts are outlined below for each question.

**[E13] What is the provider’s current information management system and level of participation in governance for HIFIS?**

* The provider will either be:
	+ using BC Housing’s HIFIS already; or
	+ collecting data another way.
* The provider may be a member of a HIFIS governance group currently or plan to join one in the future.

**[E14] What are the plans to implement HIFIS with this provider (if applicable)?**

* For providers that are not already using HIFIS, it is important to understand if they need access to HIFIS and their intent (e.g., to use HIFIS to help them fulfill their role in Coordinated Access, for their operational needs, or both).
* For providers that need access to HIFIS, it is important to know which host they prefer to work with (if there is a choice) and when they hope to start using it (i.e., what is the level of priority for onboarding). It is also important to know how many HIFIS users will be on-boarded through this provider (best guess).
* This information helps communities with their HIFIS implementation planning.

**[E15] What are other factors to consider for this provider?**

* Finally, it is important to hear about any additional considerations that the provider may want to share (e.g., related to access and ownership of data).

**[O9] How is BC Housing’s HIFIS currently being used by this provider (if applicable)?**

* For planning purposes, it may be helpful to have a better understanding of how service providers have been configured in BC Housing’s HIFIS.

**[O10] What are the provider’s data or information sharing considerations?**

* To support the process of HIFIS configuration, it will be important to understand how data is shared currently and how user rights can support more effective service delivery. For example, communities can explore questions such as:
	+ Which providers (or roles) share clients and/or information with this provider, currently?
	+ How would sharing data help clients and workers?
	+ Which data would be most helpful to share and why?
	+ What are the concerns about data sharing?
	+ Ideas for addressing these concerns?
* Gathering information about where clients get access to information about the provider can help to inform opportunities to support greater consistency in how information is shared and kept current in the public domain (e.g., online directories, brochures or pocket cards).

### Part 8: Map HIFIS User Rights

This section of the System Mapping Guide describes how to use the “Map HIFIS User Rights” tab in the System Mapping Tool using the information from the “Start Here” tab.

The purpose of the “Map User Rights” tab is to:

* Support discussions with each service provider in the housing and homelessness response system to determine:
	+ their information management and business needs;
	+ which HIFIS modules/sub-modules they need to access;
	+ the level of access they require; and,
	+ the extent to which they are willing to share data and information.
* Develop specific HIFIS user rights templates that correspond to Coordinated Access workflow roles, which can then be applied across service providers.

The “Map User Rights” tab shows all of the possible modules/sub-modules and user rights in HIFIS. It also provides examples of user right templates and shows which data elements relate to the List in the Coordinated Access module.

The tab is organized as follows:

* The tab was created using the “Excel Grouping” feature, which minimizes the amount of rows and columns displayed in the chart at one time. To expand the columns, click on the “2”. To expand the rows, click the “3”.
* In the “minimized” view, all HIFIS modules are displayed as rows.
* HIFIS user rights are presented with the most commonly used HIFIS functionalities first.
* Some cells have comments, as indicated by the small triangle in the top right corner of the cell. This provides additional information about the module or Coordinated Access workflow category.
* The options in each drop down are all the same:

|  |  |
| --- | --- |
| **Option** | **Description** |
| Yes | Needs access in HIFIS |
| Yes, not shareable | Needs access in HIFIS, but will not share details of these transactions with other Service Providers |
| No | Does not need access in HIFIS |

**Note:** The columns with pre-determined user rights are examples of user right templates. Communities will create the user rights templates that best meet the needs of their service providers and Coordinated Access system.

To complete the tab, follow these steps:

* Enter the name of a service provider **[E2]** or Coordinated Access role **[E8]** as the header for a column.
* Review the list of sub-modules for this provider/role and determine whether access to each function is needed.
* When a service provider or Coordinated Access role is needed, click the corresponding + sign, on the left hand column, to expand all of the rights associated with the sub-module.
	+ This will allow for the creation of specific user rights for each module within HIFIS.
	+ This step may occur at a more advanced stage of HIFIS implementation as there are over 700 unique user rights in HIFIS.

Communities may wish to keep the number of user rights templates to a minimum number, in order to standardize and simplify HIFIS configuration.

# Annex A. BC Questionnaire

This Annex includes three parts:

* **Part A:** BC Questionnaire and essential system mapping questions;
* **Part B:** BC Questionnaire flowchart; and,
* **Part C:** Decision-making pathways for granting DC-specific HIFIS licenses.

**Part A: BC Questionnaire and Essential System Mapping Questions**

|  |
| --- |
| **BC Questionnaire** |
| **1.** | Do any *Service Providers* **[E2]** need access to HIFIS **[E14a]** |
| **2a.** | Are **all** *Service Providers* an outreach or shelter service provider type **[E6]**? |
| **2b.** | Are **all** *Service Providers* funded by BC Housing **[E5a]** or Reaching Home **[E5b]**? |
| **3.** | Do **all** *Service Providers* want to use BC Housing’s HIFIS **[E14b]**? |
| **4.** | Is access to BC Housing’s HIFIS sufficient (current and/or planned) **[Step 3]**? |
| **5.** | Do any *Service Providers* **also** need to use a DC-specific HIFIS? |
| **6.** | Do any *Service Providers* **[E2]** use BC Housing’s HIFIS **[E13a]**? |

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| **System Mapping Questions for BC Questionnaire** |
| **Essential Service Provider Questions** |
| **[E1]** | What is the organization name? |
| **[E2]** | What is the service provider/program name? |
| **[E3]** | Is the service provider led by an Indigenous organization? |
| **[E4]** | Where are services located? |
| **[E5]** | Is the provider funded by BC Housing and/or Reaching Home?  |
| **[E6]** | What services are available to clients? |
| **Essential Coordinated Access Implementation Questions** |
| **[E7]** | Does the provider participate in governance for Coordinated Access?  |
| **[E8]** | What role(s) does the provider play in the Coordinated Access workflow? |
| **[E9]** | What is the level of shared service planning happening with other providers? |
| **[E10]** | Does the provider participate in vacancy matching and referral processes? |
| **[E11]** | Does the provider commit housing resources to the DC Coordinated Access Resource Inventory? |
| **[E12]** | Does the provider commit housing resources to BC Housing’s CAA? |
| **Essential HIFIS Implementation Questions** |
| **[E13]** | What is the provider’s current information management system and level of participation in governance for HIFIS? |
| **[E14]** | What are the plans to implement HIFIS with this provider (if applicable)? |
| **Essential “Other Information to Consider” Question** |
| **[E15]** | What are other factors to consider for this provider? |

**Part B: BC Questionnaire Flowchart**

**ALL PATHS START HERE**

**NO: 1.3**

**YES**

**YES**

***Note:*** *It is assumed that all DCs have at least one Service Provider using BC Housing’s HIFIS.*

**6.** Do any *Service Providers* **[E2]** use BC Housing’s HIFIS **[E13a]**?

**YES: 2.0**

**NO**

**PATH 2: CONTINUES HERE**

**NO: 1.5**

**YES: 1.6**

**4.** Is access to BC Housing’s HIFIS sufficient (current and/or planned) **[Step 3]**?

**YES: 1.1**

**NO: 1.2**

**ANY NO: 1.4**

**3.** Do **all** *Service Providers* want to use BC Housing’s HIFIS **[E14b]**?

**BOTH YES**

**2b.** Are **all** *Service Providers* funded by BC Housing **[E5a]** or Reaching Home **[E5b]**?

**2a.** Are **all** *Service Providers* an outreach or shelter service provider type **[E6]**?

**5.** Do any *Service Providers* **also** need to use a DC-specific HIFIS?

**NO, all *Service Providers* use BC Housing’s HIFIS**

**1.** Do any *Service Providers* **[E2]** need access to HIFIS **[E14a]**?

**Part C: Decision-Making Pathways for Granting DC-Specific HIFIS Licenses**

**PATH 1 –** Path 1 matches with **Scenario 1**, where all *Service Providers* already use or will use BC Housing’s HIFIS. There is no need to grant a DC-specific license.

|  |
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| **PATH 1.1** |
| **Pathway** | **Bilateral Discussion Points** |
| **1.** ***Yes:*** Do any *Service Providers* **[E2]** need access to HIFIS **[E14a]**?**2.** ***Yes to both:**** Are **all** *Service Providers* an outreach or shelter service provider type **[E6]**?
* Are **all** *Service Providers* funded by BC Housing **[E5a]** or Reaching Home **[E5b]**?

**3.** ***Yes:*** Do **all** *Service Providers* want to use BC Housing’s HIFIS **[E14b]**? **4.** ***Yes:*** Is access to BC Housing’s HIFIS sufficient (current and/or planned) **[Step 3]**? | * Update on engagements with BC Housing (underway and/or planned);
* Plan for onboarding all *Service Providers* to BC Housing’s HIFIS (e.g., resources, setting/adjusting user rights, timing);
* Role of ESDC in supporting next steps, if any; and,
* Other agenda items to be determined.
 |
| **Next steps following bilateral discussion:*** Move forward with onboarding *Service Providers* to BC Housing’s HIFIS.
 |

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| **PATH: 1.2** |
| **Pathway** | **Bilateral Discussion Points** |
| **1.** ***Yes:*** Do any *Service Providers* **[E2]** need access to HIFIS **[E14a]**?**2.** ***Yes to both:**** Are **all** *Service Providers* an outreach or shelter service provider type **[E6]**?
* Are **all** *Service Providers* funded by BC Housing **[E5a]** or Reaching Home **[E5b]**?

**3.** ***Yes:*** Do **all** *Service Providers* want to use BC Housing’s HIFIS **[E14b]**? **4.** ***No:*** Is access to BC Housing’s HIFIS sufficient (current and/or planned) **[Step 3]**? | * Update on engagements with BC Housing (underway and/or planned)
* Why access is insufficient, for example:
	+ Insufficient for funder requirements **[E5]** or **[O2]**;
	+ Insufficient for service provider role(s) **[E6]**;
	+ Insufficient for Coordinated Access workflow role(s) **[E8]**; and/or,
	+ Insufficient for another reason (e.g., for operator-level or administrative roles) **[E15]**;
* Explore options for resolving issues (e.g. new user rights or reports);
* Role of ESDC in supporting next steps, if any; and,
* Other agenda items to be determined.
 |
| **Next steps following bilateral discussion:*** If issues can be resolved, see bilateral discussion points for **Path 1.1**.
* If issues cannot be resolved, see **Path 2**.
 |
| **PATH 1.3** |
| **Pathway** | **Bilateral Discussion Points** |
| **1.** ***Yes:*** Do any *Service Providers* **[E2]** need access to HIFIS **[E14a]**?**2.** ***Yes to both:**** Are **all** *Service Providers* an outreach or shelter service provider type **[E6]**?
* Are **all** *Service Providers* funded by BC Housing **[E5a]** or Reaching Home **[E5b]**?

**3.** ***No:*** Do **all** *Service Providers* want to use BC Housing’s HIFIS **[E14b]**? | * Update on engagements with BC Housing (underway and/or planned);
* Why one or more *Service Providers* do not want to use BC Housing’s HIFIS;
* Explore options for resolving issues;
* Role of ESDC in supporting next steps, if any; and,
* Other agenda items to be determined.
 |
| **Next steps following bilateral discussion:*** If issues can be resolved, confirm that level of access to BC Housing’s HIFIS is sufficient;
	+ If yes, see bilateral discussion points for **Path 1.1**; or
	+ If no, see bilateral discussion points for **Path 1.2**.
* If issues cannot be resolved, see **Path 2**.
 |

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| **PATH 1.4** |
| **Pathway** | **Bilateral Discussion Points** |
| **1.** ***Yes:*** Do any *Service Providers* **[E2]** need access to HIFIS **[E14a]**?**2.** ***No to any:**** Are **all** *Service Providers* an outreach or shelter service provider type **[E6]**?
* Are **all** *Service Providers* funded by BC Housing **[E5a]** or Reaching Home **[E5b]**?
 | * Update on engagements with BC Housing (underway and/or planned);
* Confirm *Service Providers* do not meet the mandate of BC Housing’s HIFIS;
* Explore options for resolving issues;
* Role of ESDC in supporting next steps, if any; and,
* Other agenda items to be determined.
 |
| **Next steps following bilateral discussion:*** If onboarding is possible, confirm all *Service Providers* want to use BC Housing’s HIFIS.
	+ If yes, confirm that access to BC Housing’s HIFIS is sufficient;
		- If yes, see bilateral discussion points for **Path 1.1**.
		- If no, see bilateral discussion points for **Path 1.2**.
	+ If no, see bilateral discussion points for **Path 1.3**.
* If onboarding is not possible, see **Path 2**.
 |

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| **PATH 1.5** |
| **Pathway** | **Bilateral Discussion Points** |
| **1.** ***No:*** Do any *Service Providers* **[E2]** need access to HIFIS **[E14a]**?**5.** ***No:*** Do any *Service Providers* **also** need to use a DC-specific HIFIS? | * See **Path 1.1**.
 |
| **PATH 1.6** |
| **Pathway** | **Bilateral Discussion Points** |
| **1.** ***No:*** Do any *Service Providers* **[E2]** need access to HIFIS **[E14a]**?**5.** ***Yes:*** Do any *Service Providers* **also** need to use a DC-specific HIFIS? | * Update on engagements with BC Housing (underway and/or planned);
* Why a DC-specific HIFIS is also needed (e.g., user rights, access to reports, other reasons);
* Explore options for meeting all needs with BC Housing’s HIFIS, as applicable;
* Role of ESDC in supporting next steps, if any; and,
* Other agenda items to be determined.
 |
| **Next steps following bilateral discussion:*** If issues can be resolved, confirm that level of access to BC Housing’s HIFIS is sufficient (e.g., with current user rights);
	+ If yes, see bilateral discussion points for **Path 1.1**; or
	+ If no, see bilateral discussion points for **Path 1.2**.
* If issues cannot be resolved, see **Path 2**.
 |

**PATH 2 –** Path 2 matches with one of the following:

* Scenario 2: Some *Service Providers* already use or will use BC Housing’s HIFIS and some will use a DC-specific HIFIS; or,
* Scenario 3: Some *Service Providers* already use or will use BC Housing’s HIFIS, some will use a DC-specific HIFIS and some will use both.

There is likely a need to grant a DC-specific license.

|  |
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| **PATH 2.0** |
| **Pathway** | **Bilateral Discussion Points** |
| **6.** ***Yes:*** Do any *Service Providers* **[E2]** use BC Housing’s HIFIS **[E13a]**? | * Update on engagements with BC Housing (underway and/or planned);
* Plan for supporting service coordination and data integrity, for example:
	+ Reducing duplication of effort for clients seeking help from *Service Providers* **[E2]** playing a similar role in the Coordinated Access System **[E8]** and/or those located in similar service areas **[E4]**
	+ Reducing duplication of effort for workers serving the same clients **[E9a]**
	+ Reducing fragmentation in the service delivery system if one or more *Service Providers* serve a high portion of the homeless population and do not share data with others **[E9b]**
	+ Reducing fragmentation in the service delivery system if one or more *Service Providers* serve unique clientele and do not update/ maintain the List **[E9c]**
	+ Reducing fragmentation in the vacancy matching and referral process (for workers and clients) if *Service Providers* participate in different governance groups **[E7]** and/or access policies/protocols are not aligned **[E10]** and **[E9e]**
	+ Reducing fragmentation in the vacancy matching and referral process (for workers and clients) if housing resources are committed to different Coordinated Access tables **[E11]** and **[E12]** and/or if data from the List is not updated/shared; ideally, clients are able to connect to a wide range of resources for which they are eligible in a community
	+ Reducing fragmentation of data (e.g., for the List, annual results reporting, or the Community Homelessness Report)
* Confirm if some *Service Providers* will use only the DC-specific HIFIS (Scenario 2) or if some will use both (Scenario 3);
* Role of ESDC in supporting next steps, if any; and,
* Other agenda items to be determined.
 |
| **Next steps following bilateral discussion:*** Move forward with DC-specific HIFIS implementation.
* Move forward with plan for supporting service coordination and data integrity.
 |

#

# Annex B. System Mapping Tool Questions (Parts 1-7)

**Table 1.** Step 1 questions.

|  |
| --- |
| **Part 1: General Information – Essential** |
| **Questions and Response Options** | **System Mapping Tips** |
| **[E1]** Organization name | Open Text | * Organization and provider/program names may be the same
* Organizations may also have more than one service provider
* See CAEH: Provider Participation Tool
 |
| **[E2]** Service provider/program name | Open Text |
| **[E3]** Indigenous service provider | Yes; No | * See CAEH: Provider Participation Tool
 |
| **[E4]** Service location(s) | TBD | * Communities can tailor response options (e.g., entire Reaching Home Designated Community, municipality, core urban area)
 |

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| **Part 1: General Information – Optional** |
| **Questions and Response Options** | **System Mapping Tips** |
| **[O1]** Veteran Service Provider | Yes; No | * See CAEH: Provider Participation Tool
 |

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| **Part 2: Policy Direction – Essential** |
| **Questions and Response Options** | **System Mapping Tips** |
| **[E5]**Provincial and federal funding | **[a]** BC Housing | Yes; No | * See CAEH: Provider Participation Tool
* See **[E13a]** to confirm use of BC Housing’s HIFIS
 |
| **[b]** Reaching Home DC | Yes; No | * Required to participate in Coordinated Access
* See CAEH: Provider Participation Tool
 |
| **[c]** Reaching Home IH | Yes; No | * Encouraged to participate in Coordinated Access system
 |
| **[d]** Funding notes, if any | Open Text | * For example, if funding is temporary
 |

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| **Part 2: Policy Direction – Optional**  |
| **Questions and Response Options** | **System Mapping Tips** |
| **[O2]** Other funders | **[a]** Municipal | Yes; No | * Any policy implications for Coordinated Access or use of HIFIS? Any reporting requirements?
* See CAEH: Provider Participation Tool
 |
| **[b]** Health | Yes; No |
| **[c]** Other source(s) | Open Text |
| **[d]** Funding notes, if any | Open Text | * For example, if funding is temporary
 |
| **[O3]**Percentage of costs covered by funding sources | **[a]** Municipal | % | * Can be used to calculate proportional allocation of results
 |
| **[b]** BC Housing | % |
| **[c]** Reaching Home DC | % |
| **[d]** Reaching Home IH | % |
| **[e]** Health | % |
| **[f]** Other source(s) | % |
| **[O4]** Primary mandate to serve | Housing and Homelessness Response System; Other Service System | * Identifies inter-sectoral participation in the Coordinated Access system
* See CAEH: Provider Participation Tool
 |
| **[O5]** Who can be served (eligibility) | **[a]** Homeless clients | Yes; No | * Simplified questions to clarify population served
* Informs user rights
 |
| **[b]** Housed clients | Yes; No |
| **[c]** Eligibility criteria | Open Text | * Informs triage and assessment process
* Informs user rights
 |
| **[d]** Is criteria documented | Yes; No | * For housing resources receiving funded through the Reaching Home Designated Communities stream, this is a minimum requirement
* See CAEH: Provider Participation Tool
 |
| **[e]** Will eligibility be verified by the provider before an offer is made | Yes; No | * For example, does the process require specific documentation or paperwork?
 |
| **[f]** If yes to **[O5e]**, describe: when and how | Open Text | * Informs triage and assessment process
* May inform user rights (e.g., uploading files)
 |

|  |
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| **Part 3: Service Description – Essential** |
| **Questions and Response Options** | **System Mapping Tips** |
| **[E6]** Services offered | **[a]** Primary service type | Access Points; Prevention/Diversion; Street Outreach; Day Centre/Drop In; Emergency Shelter; Violence Against Women; Transitional Housing; Housing Support; Supportive Housing; Affordable Housing; Other | * Informs user rights
 |
| **[b]** If other in **[E6a]**, describe services  | Open Text |
| **[c]** Secondary service type | Access Points; Prevention/Diversion; Street Outreach; Day Centre/Drop In; Emergency Shelter; Violence Against Women; Transitional Housing; Housing Support; Supportive Housing; Affordable Housing; Other |
| **[d]** If other in **[E6c]**, describe services | Open Text |

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| **Part 3: Service Description – Optional**  |
| **Questions and Response Options** | **System Mapping Tips** |
| **[O6]**Services offered (alternate version) | **[a]** Service navigation | Yes; No | * Informs user rights
 |
| **[b]** Homelessness prevention | Yes; No |
| **[c]** Shelter diversion | Yes; No |
| **[d]** Finding and/or securing housing  | Yes; No |
| **[e]** Temporary shelter or housing | Yes; No |
| **[f]** Permanent housing | Yes; No |
| **[g]** Subsidize the cost of housing | Yes; No |
| **[h]** Support to stay housed after move-in  | Yes; No |
| **[i]** Other services | Open Text |

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| **Part 3: Service Description – Optional** |
| **Questions and Response Options** | **System Mapping Tips** |
| **[O7]**Capacity to… | **[a]** Serve | Open TextResponse suggestions: FTEs, worker to client ratios, caseloads, hours | * Applies to Service Provider Types: Access Point; Prevention/Diversion; Street Outreach; Day Centre/Drop In; Other (e.g., Service Navigation/ Housing Liaison)
 |
| **[b]** Temporarily shelter/house | Open TextResponse suggestions: Shelter – number of permanent, seasonal or overflow beds; Housing – number of units or spaces | * Applies to Service Provider Types: Emergency Shelter; Violence Against Women; Transitional Housing; Other
 |
| **[c]** Permanently house | Open TextResponse suggestions: Number of units or spaces | * Applies to Applies to Service Provider Types: Supportive Housing; Affordable Housing; Other
* Include resources dedicated to DC Coordinated Access Resource Inventory **[E11a]** and BC Housing’s CAA **[E12a]**
 |
| **[d]** Subsidize (number/amount) | Open TextResponse suggestions: Number of subsidies or total amount | * Applies to Service Provider Types: Affordable Housing; Other
* Include resources dedicated to DC Coordinated Access Resource Inventory **[E11c]** and BC Housing’s CAA **[E12c]**
 |
| **[e]** Support | Open TextResponse suggestions: FTEs, worker to client ratios, caseloads, hours | * Applies to Service Provider Types: Housing Support
* Include resources dedicated to DC Coordinated Access Resource Inventory **[E11e]** and BC Housing’s CAA **[E12e]**
 |
|  | **[f]** Other | Open Text | * Include resources dedicated to DC Coordinated Access Resource Inventory and BC Housing’s CAA
 |

**Table 2.** Step 2.

|  |
| --- |
| **Part 4: Coordinated Access System – Essential**  |
| **Questions and Response Options** | **System Mapping Tips** |
| **[E7]**Governance group membership | **[a]** Coordinated Access group(s) | Yes – Current; Yes – Planned; No | * Could be current or planned
 |
| **[b]** If yes to **[E7a]**, which group(s) | Open Text |
| **[E8]**Role(s) in workflow (current or planned) | **[a]** Refer to access point(s) | Yes; No; Maybe | * Refer people experiencing or at-risk of homelessness to the Coordinated Access system
* See CAEH: Provider Participation Tool
 |
| **[b]** Access point | Yes; No; Maybe | * Service providers follow an intake protocol and begin the triage and assessment process
* Informs user rights
* See CAEH: Provider Participation Tool
 |
| **[c]** Triage and assessment (service planning) | Yes; No; Maybe | * Homeless-serving providers can collaborate to help clients find and secure housing
* Informs user rights
* See CAEH: Provider Participation Tool
 |
| **[d]** Match clients to vacancies and/or support referrals (service planning) | Yes; No; Maybe | * When a vacancy becomes available, this role supports the matching and referral process
* Informs user rights
* Administrative role, not direct client service
 |
| **[e]** Fill vacancies through Coordinated Access | Yes; No; Maybe | * A range of providers can fill vacancies using the List
* Informs user rights
* See CAEH: Provider Participation Tool
 |

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| **Part 5: Shared Service Planning – Essential** |
| **Questions and Response Options** | **System Mapping Tips** |
| **[E9]**Serving common clients | **[a]** Does this provider share clients with those listed in **[E2]** | Most; Some;None | * Extent of shared service planning currently
 |
| **[b]** Percentage of local homeless population served by this provider (*best guess*) | % | * Impact of this provider on the homeless population (volume/scope of clients served)
 |
| **[c]** Percentage of local homeless population that only engages with this provider (*best guess*) | % | * Impact of this provider on homeless population (unique relationship with clients)
 |
| **[d]** Use common triage/assessment tool | Yes; No | * Informs user rights
* See CAEH: Provider Participation Tool
 |
| **[e]** If yes to **[E9d]**, which tool(s) | Open Text |

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| --- |
| **Part 6: Vacancy Matching and Referral Processes – Essential** |
| **Questions and Response Options** | **System Mapping Tips** |
| **[E10]**Table membership | **[a]** BC Housing’s CAA table | Yes – Current; Yes – Planned; No | * Current or planned
 |
| **[b]** Local Coordinated Access table(s) | Yes – Current; Yes – Planned; No |
| **[c]** If yes to **[E10b]**, which table(s) | Open Text |
| **[E11]**DC Coordinated Access Resource Inventory | **[a]** Housing units/spaces | # | * See CAEH: Provider Participation Tool
* All or a portion of total capacity as reported in **[O6c]**, **[O6d]**, **[O6e]**
 |
| **[b]** Housing in **[E11a]** exclusive to DC | Exclusive; Shared |
| **[c]** Subsidies (number and/or amount) | # / $ |
| **[d]** Subsidies in **[E11c]** exclusive to DC | Exclusive; Shared |
| **[e]** Support spaces | # |
| **[f]** Support spaces in **[E11e]** exclusive to DC | Exclusive; Shared |
| **[g]** Are commitments documented | Yes; No | * See CAEH: Provider Participation Tool
 |
| **[h]** Vacancy notifications: when and how | Open Text |
| **[E12]**BC Housing’s CAA | **[a]** Housing units/spaces | # | * All or a portion of total capacity as reported in **[O6c]**, **[O6d]**, **[O6e]**
 |
| **[b]** Housing in **[E12a]** exclusive to CAA | Exclusive; Shared |
| **[c]** Subsidies (number and/or amount) | # / $ |
| **[d]** Subsidies in **[E12c]** exclusive to CAA | Exclusive; Shared |
| **[e]** Support spaces | # |
| **[f]** Support spaces in **[E12e]** exclusive to CAA | Exclusive; Shared |

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| **Part 6: Vacancy Matching and Referral Processes – Optional** |
| **Questions and Response Options** | **System Mapping Tips** |
| **[O8]**Prioritization criteria for DC Coordinated Access Resource Inventory | **[a]** Housing | Open Text | * Informs user rights
 |
| **[b]** Subsidies | Open Text |
| **[c]** Support spaces | Open Text |

**Table 3.** Step 3 Questions.

|  |
| --- |
| **Part 7: Data/Information Management – Essential** |
| **Questions and Response Options** | **System Mapping Tips** |
| **[E13]**Data/information management and related governance | **[a]** Using BC Housing’s HIFIS | Yes; No | * CE may wish to confirm BC Housing’s HIFIS data entry requirements and user rights
* See CAEH: Provider Participation Tool
 |
| **[b]** If not on BC Housing’s HIFIS, how is data collected | HIFIS 3; Paper; Excel; Other | * Informs onboarding plans
 |
| **[c]** If other in **[E13b]**, describe | Open Text |
| **[d]** Member of HIFIS governance group(s) | Yes; No | * Could be current or planned
 |
| **[e]** If yes to **[E13d]**, which group(s) | Open Text |
| **[E14]**HIFIS implementation plans | **[a]** Need HIFIS | Yes, Coordinated Access;Yes, operational use; Yes, both; No; Maybe | * Informs onboarding plans
 |
| **[b]** Host preference | Open Text |
| **[c]** On-boarding priority level | High; Medium; Low |
| **[d]** On-boarding target month | [MM-YYYY] |
| **[e]** Number of HIFIS users (*best guess*) | # |
| **[E15]** Other factors to consider | Open Text | * Specific to use of HIFIS for Coordinated Access (e.g., access and ownership of data) or for meeting other operator-level or administrative roles
 |

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| **Part 7: Data/Information Management – Optional**  |
| **Questions and Response Options** | **System Mapping Tips** |
| **[O9]**Use of BC Housing's HIFIS | **[a]** BC Housing’s HIFIS Service Provider name | Open Text | * Request from BC Housing if needed
 |
| **[b]** BC Housing’s HIFIS cluster | Integrated; Private; Unknown |
| **[c]** BC Housing’s cluster name (if private) | Open Text |
| **[O10]**Information/ data sharing considerations | **[a]** Which providers (or roles) share clients and/or client information with this provider | Open Text | * Informs user rights
 |
| **[b]** How would sharing data help clients and workers | Open Text |
| **[c]** Which data would be most helpful to share and why | Open Text |
| **[d]** What are the concerns about data sharing | Open Text |
| **[e]** Ideas for addressing these concerns | Open Text |
| **[f]** How do clients access information about the provider (e.g., services, eligibility, capacity or occupancy) | Open Text | * Informs opportunities to support greater consistency in public information
 |

# Annex C. Glossary

This glossary includes four groups of terms:

* **Part A:** Housing and Homelessness Response System;
* **Part B:** Coordinated Access System;
* **Part C:** Service Planning; and,
* **Part D:** HIFIS Configuration.

**Part A: Housing and Homelessness Response System**

**Broader Community Service Systems:** Providers that help people address a range of socio-economic challenges and support referrals to the Coordinated Access system if people are experiencing or at-risk of homelessness.

**Homelessness Prevention Services – Upstream:** Providers that help people to increase their housing stability by reducing risks of homelessness either directly (e.g., paying for arrears to stop an eviction) or indirectly (e.g., helping people to increase their income security).

**Housing and homelessness response system:** All of the service providers within a geographic boundary that help people with their housing challenges. These providers are part of the same service delivery network. With a Coordinated Access workflow in place, the system shifts from an informal network of providers to a more structured service delivery approach.

**Organization:** An entity with a mandate to serve people experiencing or at-risk of homelessness (e.g., receive funding to provide services that help clients address their housing challenges).

**Service provider:** An entity with staff that directly interact with clients to help them address their housing challenges (e.g., as documented in a service plan).

**Service provider types:** Categories of service in a housing and homelessness response system. Types in bold indicate the type exists in HIFIS. Common types include:

* **Access Point** (Intake & Referrals);
* (Homelessness) **Prevention/** (Shelter) **Diversion**;
* Service Navigation/Housing Liaisons;
* **Street Outreach**;
* **Day Centre/Drop In**;
* **Emergency Shelter**;
* **Violence Against Women (VAW)**;
* **Transitional Housing**;
* **Housing Support** (Rapid Re-housing; Scattered-Site Supportive Housing); and,
* **Supportive Housing** (Place-Based); and
* **Affordable Housing** (Subsidized).

Each type of provider is defined further below.

**Access point:** Providers that help clients to connect with the Coordinated Access system through phone lines (e.g., hotlines), virtual/online spaces (e.g., websites) and/or physical locations (e.g., access centre or drop-in). Services need to be available in some form across the geographic region of the community. A flexible approach to service delivery should be used to met the needs and preferences of different groups. Services offered at access points may focus primarily on intake and referrals or also include a broader range of triage and assessment activities (e.g., prevention and diversion, as well as shelter options).

**Homelessness prevention:** Providers that help clients at imminent risk of homelessness to stay housed. Examples of prevention strategies include problem solving with landlords to stop an eviction, covering the cost of rent arrears or paying for groceries to help with that month’s budget.

**Shelter diversion:** Providers that help people to avoid a shelter stay, if other safe and appropriate options are available. Examples of shelter diversion strategies include exploring informal shelter options (e.g., staying with family or friends), referrals to other service systems (e.g., to set up family mediation supports) or other creative ideas (e.g., covering transportation costs to visit family in another community or contributing to a friend’s grocery budget so they can offer accommodation for the rest of the month).

**Service Navigation/Housing Liaisons:** Providers that help clients with their housing plans and referrals to appropriate services. Tasks can include supporting housing searches, applying for units, securing and setting-up a unit, and moving in, as well as completing and following up on paperwork for various waiting lists. Other providers (e.g., shelter or outreach staff) can also support these tasks.

**Street outreach:** Providers that help people to address their housing challenges (e.g., help with a housing plan and related service navigation) and meet their basic needs by connecting with them informally across the community. Outreach services are flexible in the way they are delivered. Workers often engage with clients wherever they are staying across the community, including encampments.

**Day centre or drop in:** Providers that help people to address their housing challenges (e.g., help with a housing plan and related service navigation) and meet their basic needs in fixed locations. A variety of services can be offered on-site, including food (e.g., free daily meals), personal facilities (e.g., free access to bathrooms, showers or laundry services) or clinics (e.g., for identification replacement or health services). Housing-focusing day centres or drop-ins are sometimes referred to as Housing Resource Centres, where clients can connect with staff and other resources (e.g., access to free phones and computers for their housing search).

**Emergency shelter:** Providers that offer temporary or short-term accommodations for people experiencing homelessness, which may include essential services such as food, clothing and help with a housing plan.

**Violence Against Women (VAW) – Shelter:** Providers that offer emergency beds and related services for women and their children fleeing violence or the threat of violence.

**Transitional housing:** Providers that offer temporary or time-limited accommodations, with stays ranging from a few months to a few years. The living environment is supportive and includes programming appropriate for the population group being served. Clients are helped to transition to more independent living at discharge.

**Housing support:** Providers that help clients to stay housed by offering a range of supports through home visits or by meeting with clients in various community settings. Supportive services can include coordinating access to a range of services that help with reducing depth of need (acuity) in the areas of life that create risks to a tenancy (e.g., health care). Housing support providers are included in the Coordinated Access Resource Inventory if vacancies are filled through Coordinated Access. Supports that are designated to clients, not specific housing buildings or units, often follow clients if they move. These housing supports are also sometimes referred to as “portable”.

There are two common categories of housing support options that depend on the level of intensity of service provided (e.g., frequency or duration):

* **Rapid Re-Housing:** Refers to shorter-term housing support, often for clients with low to moderate depth of need (acuity).
* **Scattered-Site Supportive Housing:** Refers to longer-term housing support, often for clients with higher depth of need (acuity).

**Supportive housing:** Providers that help clients to stay housed by offering affordable housing with dedicated supports (to a building or units within a building). People living in supportive housing often have higher depth of need (acuity) and require some form of on-site services that help them to maintain housing stability (e.g., due to disabilities or more complex medical issues). Supportive housing providers are included in the Coordinated Access Resource Inventory if vacancies are filled through Coordinated Access. Services are tied to a building or unit and they do not generally follow clients if they move (also sometimes referred to as “place-based” or “fixed-site” supports).

**Affordable housing:** Providers that offer affordable housing (without dedicated supports to a building or units within a building). For housing to be affordable to people with fixed or low incomes, rental rates will need to be subsidized (e.g., rent subsidies/supplements, housing allowances). Some tenants will pay a reduced monthly rent called Rent Geared to Income (RGI) where the amount charged is never more than a certain percentage of monthly income. Affordable housing providers are included in the Coordinated Access Resource Inventory if vacancies are filled through Coordinated Access.

**Part B: Coordinated Access System**

**Intake:** In the context of Coordinated Access, refers to the initial point of entry into the housing and homelessness response system.

**Intake protocol:** A written document that outlines the steps that service providers need to take when individuals and families connect with the Coordinated Access system. For example, intake protocols should outline how to obtain or confirm consents, create or update client records and document transactions in the Homelessness Management Information System (HMIS), such as HIFIS. It is a minimum requirement to have an intake protocol for entering clients as new or returning to the Coordinated Access system and HMIS.

**Eligibility criteria:** Minimum admission requirements for a service provider including how these requirements are verified. Eligibility criteria are pre-determined, documented, and used to filter clients on the List when a vacancy becomes available, so that only eligible clients are considered for an offer. They can apply to a type of housing resource (e.g., all supportive housing) and/or a smaller subset of that type (e.g., a unit in a supportive housing building).

**Coordinated Access Resource Inventory:** Specific housing resources for which access is being formally coordinated in the Coordinated Access system. Common housing resources include housing units, rent subsidies and case managers that help people to stay housed. There are no “side doors” to accessing resources in the inventory – referrals are managed centrally and all vacancies are filled through Coordinated Access. The Coordinated Access Resource Inventory includes a description of each resource, eligibility criteria (minimum admission requirements) and prioritization criteria (how eligible clients are selected for an offer), including documentation required and how the information is verified (if applicable). Housing resources funded through the Reaching Home Designated Communities stream must be included in the Coordinated Access Resource Inventory. Housing resources funded by other sources can also be included.

**Prioritization criteria:** Forms part of the local prioritization policy that outlines the order in which eligible clients will be offered vacancies from the Coordinated Access Resource Inventory. Prioritization criteria are pre-determined, documented, and used to filter eligible clients on the List when a vacancy becomes available. They can be shared for more than one type of housing resource (e.g., all rapid re-housing and supportive housing) or apply to only one type (e.g., only supportive housing). Criteria for housing resources should be established based on the outcomes that communities want to see over time. They can be adjusted if a change in prioritization will help to further progress with achieving these desired results at the community level.

**Coordinated Access workflow:** The Coordinated Access “client service path” designed to create greater clarity and efficiency in how providers work together in a community. To create a community-level workflow for Coordinated Access, providers agree to fulfill one or more of the following roles:

* Referral source;
* Access point;
* Triage and assessment (service planning);
* Matching clients to vacancies (service planning); and/or,
* Fill vacancies through Coordinated Access (part of the Coordinated Access Resource Inventory).

Each role is defined further below.

**Refer to access point:** Provider refers people experiencing or at-risk of homelessness to the Coordinated Access system so they can be served appropriately. Protocols may identify any documentation that needs to accompany client referrals.

**Access point:** See definition in Part A.

**Triage and assessment (service planning):** Refers to the process of gathering necessary information about clients in order to support effective service planning including making appropriate referrals. Triage begins at the first point of contact with an individual or a family, where consents are secured and steps are taken to prevent homelessness or divert from shelter (as appropriate). The process can continue beyond triage, if deeper engagement and additional assessments are required to help clients find and secure housing (with supports, as appropriate). The goal is to ensure that eligible clients are ready to accept offers from the Coordinated Access Resource Inventory when vacancies becomes available that meet their needs and preferences.

**Vacancy matching and referral:** Refers to the process of matching clients with open or pending vacancies from the Coordinated Access Resource Inventory, based on eligibility and need, and then prioritizing who gets an offer first. The process is highly collaborative and supported by the Coordinated Access Lead. The goal is to manage resources efficiently, accommodate client choice, and manage constructive inter-agency communication when vacancies become available.

There are two main roles in this process:

* **Matching clients to vacancies (service planning):** When a vacancy becomes available, this role supports the matching and referral process. It is typically an administrative role, not direct service. Tasks include filtering the List so that only eligible clients are considered for an offer and referrals are made in the right order (i.e., in alignment with the local prioritization policy or protocol). Case conferencing is often used to discuss which client(s) will be referred for an offer.
* **Filling vacancies through Coordinated Access:** A range of providers can fill vacancies using the List, including those with resources committed to the Coordinated Access Resource Inventory as well as private market landlords and providers from other systems (e.g., disability and health care sectors).

**Part C: Service Planning**

**Service plans:** Documented, person-centred plans of action that help clients to achieve their housing stability goals.

**Service planning:** The process of developing and implementing service plans with clients. The “intent” of the interactions differentiates various forms of service planning. For example, service plans can focus on the following outcomes:

* **Homelessness prevention:** Helping clients to stay housed, including stopping an eviction if they are at imminent risk. Generates a “prevention plan”.
* **Shelter diversion:** Helping clients experiencing homelessness to avoid shelter. Generates a “shelter diversion plan”.
* **Housing placement:** Helping clients to transition to new housing. Generates a “housing plan”.
* **Housing support:** Helping clients to stabilize in their housing and prevent a return to homelessness. Generates a “support plan”.
* **Moving on:** Helping clients to transition from more intensive services like supportive housing to less intensive services like affordable housing (without support). Generates a “transition plan”.

**Shared service planning:** A collaborative process where service providers work together to develop and implement a service plan. Shared service planning is more efficient when transactions are documented in the same Homelessness Management Information System (HMIS) such as HIFIS. This requires user rights that allow client information to be shared.

**Case management:** 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 service navigation or housing support.

**Case conferencing:** Face-to-face or virtual meetings that support an intentional and collaborative approach to service delivery. There are two main types of case conferences:

* **Prioritization:** Case conferences can include the Coordinated Access Lead, service providers with clients ready to receive an offer and service providers with a vacancy. During the case conference, clients are matched with vacancies and next steps are confirmed.
* **Service Planning:** Case conferences can be used at any point to support strategic problem solving between various service providers involved in supporting a client.

**Referral:** Recommending the services of another provider based on need and eligibility, as part of a client’s service plan.

**Part D: HIFIS Configuration**

**HIFIS Service Providers:** Configuration of an organized and logical “set of services” available to clients in a housing and homelessness response system. Transactions in HIFIS are based on the *HIFIS Service Provider* in which users are logged into. Client information is shared within and between HIFIS Service Providers based on user rights. User rights are granted to HIFIS users based on the role they play in their organization (i.e., HIFIS Service Provider) and the role that this organization plays in the Coordinated Access system.

**Primary HIFIS Service Provider:** A HIFIS Service Provider configured to have the ability to modify the mandatory fields and look-up table values of a HIFIS Service Provider that falls under it in the List of Service Providers, which is referred to as the secondary HIFIS Service Provider in this context.

**Secondary HIFIS Service Provider:** A HIFIS Service Provider that is configured to not have the ability to modify mandatory fields or look-up table values because this right has been granted to a primary HIFIS Service Provider above it in the List of HIFIS Service Providers.

**HIFIS Service Provider List:** The list of service providers in the HIFIS database.

**HIFIS Program:** A label or tag used for grouping client transactions by category for the purpose of reporting aggregate and client level data. HIFIS Programs can track transactions within or across HIFIS Service Providers. For example:

* Shelter services and clients’ stay-related needs (e.g., identifying stays where clients are able to do a self-directed housing search versus stays where more intensive housing help is needed; tagging when youth programming was provided to clients during a stay; or identifying stays linked to an emergency or natural disaster).
* Goods and services funded by the same source(s) (e.g., Reaching Home funded rent arrears).
* Housing resources funded by the same source (e.g., Reaching Home funded supportive housing units in a building or workers on a rapid re-housing team).

**User rights:** A HIFIS feature that supports the safeguarding of client information by ensuring HIFIS users can only access the modules and client information necessary to do their job. Rights specify if a user can see, edit, list and/or delete data in the modules/data fields they can access. Rights are granted based on a number of factors, including the role they play in their organization and the role that organization plays in the Coordinated Access workflow.

**Rights templates:** Functionality that allows a HIFIS Administrator to apply the same user rights to multiple HIFIS users that need access to the same modules/data fields to do their jobs (e.g., their same the same role in their organization or Coordinated Access workflow).