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| **SETTING UP USER RIGHTS IN HIFIS** |

This *HIFIS How To: Guidance* resource provides practical information on how to set up User Rights in HIFIS. There are many ways that HIFIS Leads can approach setting up user rights and access to HIFIS. HIFIS Leads who have been through this process suggest in this document some basic steps. They outline each step and provide some tips to keep in mind at each step. Sample tools that may help you organize and track your User Rights are found in Annex A and B.

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When setting up your user rights in HIFIS, it is important to know what role your leadership or governance group has regarding access and privacy, so that you will know when to consult them in the process. If your leadership group already exists (e.g. your Community Advisory Board (CAB) is overseeing HIFIS implementation) then consult them about their expectations (e.g. decision-making, reviewing, approval, for information only). If community is in the process of creating the governance structure, now is a good time to consider setting up a HIFIS Working Group*,* as well as how each group will be involved in setting up the User Rights. [*Developing a Terms of Reference for a HIFIS Working Group*](https://homelessnesslearninghub.ca/library/resources/developing-a-terms-of-reference-for-a-hifis-working-group/)support your framework.

1. **BASIC STEPS**

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| **BASIC STEPS FOR SETTING UP USER RIGHTS**  **STEP 1** – Get to know the workflow of Service Providers and roles of those who will be using HIFIS.  **STEP 2** – Match the roles with the functions in HIFIS.  **STEP 3** – Work to develop the User Rights Templates.  **STEP 4** – Share the User Rights templates with your Leadership Group to finalize the templates. |

1. **DESRIPTION AND TIPS**

In this section each of the four steps are described in more detail. Tips to keep in mind are based on the experience of communities who have set up User Rights Templates for their implementation of HIFIS. Each community may take a different approach based on their many factors. These steps and tips are meant for consideration only.

**STEP 1** – Get to know the workflow of Service Providers and roles of those who will be using HIFIS.

Meet with your Service Providers to learn about their workflows, the tasks of their staff and their expectations of HIFIS. This may require multiple meetings over months. You may already have done much of this work if you have done system mapping. See the [*Service System Mapping Case Study*](https://homelessnesslearninghub.ca/library/resources/service-system-mapping-case-study-how-a-community-mapped-their-service-system-and-what-they-learned/)resource to see how these two processes are linked.

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| **TIPS** | * Consider having the initial conversation with Service Providers about how operationally they work and not introduce HIFIS functions until later in the process. |
|  | * Be careful not to overwhelm them by showing them everything HIFIS can do, especially, if not directly related to their workflow or desired outcomes. |
|  | * Start your meetings small, perhaps first meet with just the shelters, or you could break it down further to meet only with those in the same roles within your community’s Service Providers (ex. all the shelter workers meet to work out the access they need according to their tasks, then meet with the caseworkers, etc.). |
|  | * There will be a lot of data that will need to be tracked and quality checked, so starting small will allow everyone time to test, learn, integrate and adapt those processes before expanding to other Service Providers. |
|  | * Keep the number of User Rights Templates you have to a minimum, especially in the beginning. It will be easier to manage and to track quality. Less than 5 is ideal. User rights can be changed later, but keeping it simple to start will be easier for everyone. |
|  | * First, sort out which Service Providers need access to what modules in HIFIS to complete their workflow. You can use a tool such as the [*Module Access List*](https://homelessnesslearninghub.ca/library/resources/hifis-module-access-list/) to help you. After determining what modules for the Service providers, you will move on to Step 2 to determine access levels. |
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**STEP 2** – Match the roles with the functions in HIFIS.

Map out the basic workflow of each of the roles you will have and match the task to which functions in HIFIS they will need access to or not. Remember to keep the number of templates to a minimum.

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| **TIPS** | * It can take time to ensure that everyone has had their say and feels comfortable with proposed access. Consider limiting timelines that everyone is aware of and can live with, to avoid the process going around in circles and delaying progress. |
|  | * Set up your User Rights for only what they need as a Template to do the basics. It is easy to change the rights as needed when your project expands. Things will change and the User Rights will go in phases as your implementation expands. |
|  | * Consult your legal and privacy experts. |

**STEP 3** – Work to develop the User Rights Templates.

If you have formed a HIFIS Working Group, consider developing the User Rights Templates through this group and then present to the Service Providers for final feedback. If working directly with your Service Providers to develop the templates, you may need to meet with them multiple times in order to get to a final stage in the development of your User Rights Templates.

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| **TIPS** | * Share scenarios of lessons learned from other communities that support your approach. You may need to do this at an earlier stage to move this forward. |
|  | * Consider using your HIFIS testing environment in a meeting with Service Providers to show them examples of how the different templates work. This also works well when you bring on new providers, for example, you can show them what exists in the case management module and how user rights templates impact the notes/comments in HIFIS. |
|  | * Consider preparing a demonstration in HIFIS for what different access rights mean. This could be early on to alleviate privacy and security issues or not until templates are ready to be proposed. * When there is disagreement, here are a few tips that might help move things forward:   + Encourage that less is more and give examples;   + Exercise patience; and   + Demonstrate how some rights can raise a barrier to someone getting into a program. |
|  | * Privacy will be a concern for most Service Providers. Consider using the Attestation function in HIFIS, that in order to get access to a client file a user from a Service Provider must click on the attestation function first. It can be a bit cumbersome with high numbers of clients, but it helps users realize that they have a responsibility to the client when accessing their information. Attestation can help Service Providers feel more in control of access and put a community's minds at ease. |
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**STEP 4** – Share the User Rights templates with your Leadership Group to finalize the templates.

Depending on the roles and responsibilities or your Leadership Group and/or your HIFIS Working Group, you may present the templates for feedback or simply for information. If decision-making or consensus is required, you may need to demonstrate how the draft User Rights Templates will work for each role.

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| **TIPS** | * To promote understanding and acceptance of the templates, present a demonstration of how the different access levels play out by using your HIFIS Test/Training environment similar to what you may have done in Step 3 with your Service Providers. |
|  | * Use a tool such as the [*User Rights Matrix*](#_APPENDIX_B_-)(Annex A)that helps explain your user rights to your Leadership Group at a quick glance, it can help you keep track of what you have set up when changes are needed and it is a good training tool. |

1. **RELATED RESOURCES**

* [Sample User Rights Templates](https://homelessnesslearninghub.ca/library/resources/sample-user-rights-templates/) - This document includes examples of user rights templates for four different role types.
* [User Rights and Access Webinar](https://homelessnesslearninghub.ca/library/resources/user-rights-and-access-webinar/) – Webinar Recording

1. **SAMPLE TOOLS**

The two annexes included in this document are samples, also found on the Homelessness Learning Hub:

1. [Module Access List](https://homelessnesslearninghub.ca/library/resources/hifis-module-access-list/)
2. [User Rights Matrix](https://homelessnesslearninghub.ca/library/resources/hifis-user-rights-matrix/)

1. **Module Access List**

Decide what modules your Service Provides will have access to (in any capacity). Once filled in this will be the basis for your User Rights Template 1.

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| **Module** | **Service Provider A** | **Service Provider B** | **Service Provider C** |
| Administration - Express Goods and Services Templates | ✔ |  |  |
| Administration - Food Bank Items |  | ✔ |  |
| Administration - Look-up Tables | ✔ |  |  |
| Administration - Manage Custom Tables |  |  |  |
| Administration - Programs |  |  |  |
| Administration - Questionnaires |  |  |  |
| Administration - Rights Templates |  |  |  |
| Administration - Service Providers |  |  |  |
| Administration - User Rights |  |  |  |
| Admissions - Reservations |  |  |  |
| Admissions - Room and Beds |  |  |  |
| Admissions - Stays |  |  |  |
| Assessments - F-SPDAT |  |  |  |
| Assessments - TAY-VI-SPDAT |  |  |  |
| Assessments - VAT Module |  |  |  |
| Assessments - VI-F-SPDAT |  |  |  |
| Assessments - VI-SPDAT |  |  |  |
| Assessments - Y-SPDAT |  |  |  |
| Clients - Profile Picture |  |  |  |
| Clients - Appointments |  |  |  |
| Clients - Calls/Visits Log |  |  |  |
| Clients - Case Management |  |  |  |
| Clients - Chores |  |  |  |
| Clients - Client Details |  |  |  |
| Clients - Comments |  |  |  |
| Clients - Conflicts |  |  |  |
| Clients - Consent |  |  |  |
| Clients - Contact Information |  |  |  |
| Clients - Contacts |  |  |  |
| Clients - Dietary Requirements |  |  |  |
| Clients - Documents |  |  |  |
| Clients - Education |  |  |  |
| Clients - Family |  |  |  |
| Clients - Follow ups |  |  |  |
| Clients - Goods and Services |  |  |  |
| Clients - Health Information |  |  |  |
| Clients - Housing History |  |  |  |
| Clients - Housing Loss Prevention |  |  |  |
| Clients - Housing Placement |  |  |  |
| Clients - Identification |  |  |  |
| Clients - Incidents |  |  |  |
| Clients - Languages |  |  |  |
| Clients - Medication |  |  |  |
| Clients - Medication Dispensing |  |  |  |
| Clients - People Profile Picture |  |  |  |
| Clients - Physical Appearance |  |  |  |
| Clients - Risk of Homelessness |  |  |  |
| Clients - Service Restrictions |  |  |  |
| Clients - Storage |  |  |  |
| Clients - Subsidy |  |  |  |
| Clients - Survey |  |  |  |
| Clients - Turn Aways |  |  |  |
| Clients - Vehicles |  |  |  |
| Communications - Bulletins |  |  |  |
| Communications - Messaging |  |  |  |
| Custom Table Records |  |  |  |
| Custom Tables Manager |  |  |  |
| Finance - Expense |  |  |  |
| Finance - Income |  |  |  |
| Financial - Assets and Liabilities |  |  |  |
| Front Desk - Block Operations |  |  |  |
| Front Desk - Directory of Services |  |  |  |
| Front Desk - Food Banks |  |  |  |
| Front Desk - Group Activities |  |  |  |
| Front Desk - Housing Units |  |  |  |
| Front Desk - Landlords |  |  |  |
| Front Desk - People |  |  |  |
| Front Desk - Waiting Lists |  |  |  |
| PiT Count |  |  |  |
| Report Manager |  |  |  |
| Various Factor - Contributing Factor |  |  |  |
| Various Factors - Behavioural Factor |  |  |  |
| Various Factors - Life Events |  |  |  |
| Various Factors - Watch Concerns |  |  |  |

1. **User Rights Matrix**

Once you have developed your User Rights for each of role, you can use a table like this to track your current templates and the level of access each role has. This is a great aid for training, sharing with the Leadership Group, and for consulting when level changes are required.

