# Shelter Worker Template\*

**Client Information**

Client Details

Vitals

Add Vitals

Display Vitals

Edit Vitals

Client Profile Picture

Add Profile Picture

Display Client Profile Picture

Consent

Add Consent

Display Consent

Edit Consent

List Consent

Documents

Add Documents

Document Photos

Download Documents

Edit Documents

List Documents

Upload Documents

Education

Add Education

Display Education

Edit Education

List Education

Family

Add Family

Display Family

Family Group Membership

Join Family

Move to Another Family

Terminate Client Memberships

Terminate Memberships

Family Members

Display Members

Get New Members

Update Members

List Family Heads

Select Head of Family

Select Heads of Family

Financial Profiles

Display Financials

Income

Add Income Records

Edit Income Records

Housing History

Add Housing Records

Display Housing

Edit Housing Records

List Housing Records

Various Factors

Behavioural Factor

Add Behavioural Factor Records

Edit Behavioural Factor Records

List Behavioural Factor Records

See Behavioural Factor Records

Contributing Factor

Add Contributing Factor Records

Edit Contributing Factor Records

List Contributing Factor Records

See Contributing Factor Records

List Client Factors

Consider who you will allow to add/edit bulletins, for example, only your Super-Users can add/edit bulletins, so it does not become a misused or over used feature.

Ensure that your policy/practice is clear and documented.

**Communications**

Bulletins

Add Bulletins

Attach a client to a bulletin

Bulletins Home Page

Close Bulletin

Display Bulletins

Edit Bulletins

List of Bulletins

Print Bulletin

Messaging

Edit Messages

List Messages

Print a Message

Read Messages

Send Messages

**HIFIS Modules**

Admissions

Access to Admission Module

Manage Rooms and Beds

Stays

Book In

Book Out

Display Stay

Edit Stay Records

List Client Stay Records

List Stay Records

Undo Bookout

View Bed Availability

Clients

Add Clients

Edit Clients

List Clients

Search Client

Custom Table Records

Add Custom Table Records

Edit Custom Table Records

List Custom Table Records

Incidents

Add Incident Records

Display Incident

Edit Incident Records

List Incident Records

Service Restrictions

Add Service Restrictions

Display Service Restrictions

Edit Service Restrictions

List Client Service Restrictions

List Service Restrictions

Turn Aways

Add Turn Away Records

Display Turn Away Records

Edit Turn Away Records

List Client Turn Away Records

List Turn Away Records

View Bed Availability

**Logon**

**On The Fly Buttons**

Add Client

# Shelter Case Worker Template\*

**Assessments**

SPDAT Access

TAY-VI-SPDAT

Add TAY-VI-SPDAT Version 1

Display TAY-VI-SPDAT

Edit TAY-VI-SPDAT

List Client TAY-VI-SPDAT

List TAY-VI-SPDAT

VI-F-SPDAT

Add VI-F-SPDAT Version 2

Display VI-F-SPDAT

Edit VI-F-SPDAT

List Client VI-F-SPDAT

List VI-F-SPDAT

VI-SPDAT

Add VI-SPDAT Version 2

Display VI-SPDAT

Edit VI-SPDAT

List Client VI-SPDAT

List VI-SPDAT

**Client Information**

Consider including access to client's contact information (phone, email), so that the Shelter Case Worker can follow-up with them.

Client Details

Vitals

Add Vitals

Display Vitals

Edit Vitals

Client Profile Picture

Add Profile Picture

Display Client Profile Picture

Consent

Add Consent

Display Consent

Edit Consent

List Consent

Documents

Add Documents

Document Photos

Download Documents

Edit Documents

List Documents

Upload Documents

Education

Add Education

Display Education

Edit Education

List Education

Family

Add Family

Display Family

Family Group Membership

Join Family

Move to Another Family

Terminate Client Memberships

Terminate Memberships

Family Members

Display Members

Get New Members

Update Members

List Family Heads

Select Head of Family

Select Heads of Family

Financial Profiles

Display Financials

Income

Add Income Records

Edit Income Records

Housing History

Add Housing Records

Display Housing

Edit Housing Records

List Housing Records

Various Factors

Behavioural Factor

Add Behavioural Factor Records

Edit Behavioural Factor Records

List Behavioural Factor Records

See Behavioural Factor Records

Contributing Factor

Add Contributing Factor Records

Edit Contributing Factor Records

List Contributing Factor Records

See Contributing Factor Records

List Client Factors

**Communications**

Bulletins

Add Bulletins

Attach a client to a bulletin

Bulletins Home Page

Close Bulletin

Display Bulletins

Edit Bulletins

List of Bulletins

Print Bulletin

Messaging

Edit Messages

List Messages

Print a Message

Read Messages

Send Messages

**HIFIS Modules**

Admissions

Access to Admission Module

Manage Rooms and Beds

Stays

Book In

Book Out

Display Stay

Edit Stay Records

List Client Stay Records

List Stay Records

Undo Bookout

View Bed Availability

Clients

Add Clients

Edit Clients

List Clients

Search Client

Custom Table Records

Add Custom Table Records

Edit Custom Table Records

List Custom Table Records

Goods and Services

Add Express Services

Display Goods and Services

Edit Goods and Services

List Goods and Services

Incidents

Add Incident Records

Display Incident

Edit Incident Records

List Incident Records

Service Restrictions

Add Service Restrictions

Display Service Restrictions

Edit Service Restrictions

List Client Service Restrictions

List Service Restrictions

Survey

Add Client Survey

List Client Survey

View Client Survey

Turn Aways

Add Turn Away Records

Display Turn Away Records

Edit Turn Away Records

List Client Turn Away Records

List Turn Away Records

View Bed Availability

Waiting Lists

Display Waiting List

Front Desk List

List of Waiting Lists

**Logon**

**On The Fly Buttons**

Add Client

# Shelter Manager Template\*

Consider user management. Maybe not adding users, but resetting passwords and disabling them.

**Administration**

Service Providers

Display Service Providers

Edit Service Providers

List Service Providers

Rooms and Beds

Add Room and Beds Records

Delete Room and Beds Records

Edit Room and Beds Records

List Room and Beds Records

**Assessments**

SPDAT Access

TAY-VI-SPDAT

Add TAY-VI-SPDAT Version 1

Display TAY-VI-SPDAT

Edit TAY-VI-SPDAT

List Client TAY-VI-SPDAT

List TAY-VI-SPDAT

VI-F-SPDAT

Add VI-F-SPDAT Version 2

Display VI-F-SPDAT

Edit VI-F-SPDAT

List Client VI-F-SPDAT

List VI-F-SPDAT

VI-SPDAT

Add VI-SPDAT Version 2

Display VI-SPDAT

Edit VI-SPDAT

List Client VI-SPDAT

List VI-SPDAT

**Client Information**

Client Details

Vitals

Add Vitals

Display Vitals

Edit Vitals

Client Profile Picture

Add Profile Picture

Display Client Profile Picture

Consent

Add Consent

Display Consent

Edit Consent

List Consent

Documents

Add Documents

Document Photos

Download Documents

Edit Documents

List Documents

Upload Documents

Education

Add Education

Display Education

Edit Education

List Education

Family

Add Family

Display Family

Family Group Membership

Join Family

Move to Another Family

Terminate Client Memberships

Terminate Memberships

Family Members

Display Members

Get New Members

Update Members

List Family Heads

Select Head of Family

Select Heads of Family

Financial Profiles

Display Financials

Income

Add Income Records

Edit Income Records

Housing History

Add Housing Records

Display Housing

Edit Housing Records

List Housing Records

Various Factors

Behavioural Factor

Add Behavioural Factor Records

Edit Behavioural Factor Records

List Behavioural Factor Records

See Behavioural Factor Records

Contributing Factor

Add Contributing Factor Records

Edit Contributing Factor Records

List Contributing Factor Records

See Contributing Factor Records

List Client Factors

**Communications**

Bulletins

Add Bulletins

Attach a client to a bulletin

Bulletins Home Page

Close Bulletin

Display Bulletins

Edit Bulletins

List of Bulletins

Print Bulletin

Messaging

Edit Messages

List Messages

Print a Message

Read Messages

Send Messages

**HIFIS Modules**

Admissions

Access to Admission Module

Manage Rooms and Beds

Stays

Book In

Book Out

Display Stay

Edit Stay Records

List Client Stay Records

List Stay Records

Undo Bookout

View Bed Availability

Clients

Add Clients

Edit Clients

List Clients

Search Client

Custom Table Records

Add Custom Table Records

Edit Custom Table Records

List Custom Table Records

Goods and Services

Add Express Services

Display Goods and Services

Edit Goods and Services

List Goods and Services

Incidents

Add Incident Records

Display Incident

Edit Incident Records

List Incident Records

Service Restrictions

Add Service Restrictions

Display Service Restrictions

Edit Service Restrictions

List Client Service Restrictions

List Service Restrictions

Survey

Add Client Survey

List Client Survey

View Client Survey

Turn Aways

Add Turn Away Records

Display Turn Away Records

Edit Turn Away Records

List Client Turn Away Records

List Turn Away Records

View Bed Availability

Waiting Lists

Display Waiting List

Front Desk List

List of Waiting Lists

**Logon**

**On The Fly Buttons**

Add Client

# Case Worker Template (A)\*

**Assessments**

SPDAT Access

TAY-VI-SPDAT

Add TAY-VI-SPDAT Version 1

Display TAY-VI-SPDAT

Edit TAY-VI-SPDAT

List Client TAY-VI-SPDAT

List TAY-VI-SPDAT

VI-F-SPDAT

Add VI-F-SPDAT Version 2

Display VI-F-SPDAT

Edit VI-F-SPDAT

List Client VI-F-SPDAT

List VI-F-SPDAT

VI-SPDAT

Add VI-SPDAT Version 2

Display VI-SPDAT

Edit VI-SPDAT

List Client VI-SPDAT

List VI-SPDAT

**Client Information**

Consider whether this Case Worker would need to have access to the Client's contact information (phone, email) or not.

Client Details

Vitals

Add Vitals

Display Vitals

Edit Vitals

Client Profile Picture

Add Profile Picture

Display Client Profile Picture

Consent

Add Consent

Display Consent

Edit Consent

List Consent

Documents

Add Documents

Document Photos

Download Documents

Edit Documents

List Documents

Upload Documents

Education

Add Education

Display Education

Edit Education

List Education

Family

Add Family

Display Family

Family Group Membership

Join Family

Move to Another Family

Terminate Client Memberships

Terminate Memberships

Family Members

Display Members

Get New Members

Update Members

List Family Heads

Select Head of Family

Select Heads of Family

Financial Profiles

Display Financials

Income

Add Income Records

Edit Income Records

Housing History

Add Housing Records

Display Housing

Edit Housing Records

List Housing Records

Various Factors

Behavioural Factor

Add Behavioural Factor Records

Edit Behavioural Factor Records

List Behavioural Factor Records

See Behavioural Factor Records

Contributing Factor

Add Contributing Factor Records

Edit Contributing Factor Records

List Contributing Factor Records

See Contributing Factor Records

List Client Factors

**Communications**

Bulletins

Add Bulletins

Attach a client to a bulletin

Bulletins Home Page

Close Bulletin

Display Bulletins

Edit Bulletins

List of Bulletins

Print Bulletin

Messaging

Edit Messages

List Messages

Print a Message

Read Messages

Send Messages

**HIFIS Modules**

Admissions

Access to Admission Module

Manage Rooms and Beds

Stays

List Client Stay Records

View Bed Availability

Case Management

Add Case Management Records

Comments

Add CM Comment

Display Case Management Comments

Edit CM Comment

Display Case Management

Edit Case management Records

List Case Management Cases

List Client Case Management Cases

Sessions

Add CM Session

Display CM Session

Display Case Management Sessions

Edit CM Session

Clients

Add Clients

Edit Clients

List Clients

Search Client

Custom Table Records

Add Custom Table Records

Edit Custom Table Records

List Custom Table Records

Follow Ups

Add Follow Up

Display Follow Ups

Edit Follow Ups

List Follow Ups

Goods and Services

Add Express Good

Display Goods and Services

Edit Goods and Services

List Goods and Services

Housing Placement

Add Attempt

Add Housing Placements

Display Housing Placement

Edit Housing Placements

List Client Housing Placement Records

List Housing Placement Records

Move In A Housing Placement

Secure Housing for a Housing Placement

Housing Units

Add Housing Unit Records

Incidents

Add Incident Records

Display Incident

Edit Incident Records

List Incident Records

Service Restrictions

Add Service Restrictions

Display Service Restrictions

Edit Service Restrictions

List Client Service Restrictions

List Service Restrictions

Survey

Add Client Survey

List Client Survey

View Client Survey

Turn Aways

Add Turn Away Records

Display Turn Away Records

Edit Turn Away Records

List Client Turn Away Records

List Turn Away Records

View Bed Availability

**Logon**

**On The Fly Buttons**

Add Client

# Case Worker Template (B)\*

**Assessments**

F-SPDAT

Add F-SPDAT Version 2

Consider whether one Case Worker template is required or if different access is needed for a second case worker role.

Display F-SPDAT

Edit F-SPDAT

List Client F-SPDAT

List F-SPDAT

SPDAT

Add SPDAT Version 4

Display SPDAT

Edit SPDAT

List Client SPDAT

List SPDAT

SPDAT Access

TAY-VI-SPDAT

List Client TAY-VI-SPDAT

List TAY-VI-SPDAT

VI-F-SPDAT

List Client VI-F-SPDAT

List VI-F-SPDAT

VI-SPDAT

List Client VI-SPDAT

List VI-SPDAT

Y-SPDAT

Add Y-SPDAT Version 1

Display Y-SPDAT

Edit Y-SPDAT

List Client Y-SPDAT

List Y-SPDAT

**Client Information**

Client Details

Vitals

Add Vitals

Display Vitals

Edit Vitals

Client Profile Picture

Add Profile Picture

Display Client Profile Picture

Consent

Add Consent

Display Consent

Edit Consent

List Consent

Documents

Add Documents

Document Photos

Download Documents

Edit Documents

List Documents

Upload Documents

Education

Add Education

Display Education

Edit Education

List Education

Family

Add Family

Display Family

Family Group Membership

Join Family

Move to Another Family

Terminate Client Memberships

Terminate Memberships

Family Members

Display Members

Get New Members

Update Members

List Family Heads

Select Head of Family

Select Heads of Family

Financial Profiles

Display Financials

Income

Add Income Records

Edit Income Records

Housing History

Add Housing Records

Display Housing

Edit Housing Records

List Housing Records

Various Factors

Behavioural Factor

Add Behavioural Factor Records

Edit Behavioural Factor Records

List Behavioural Factor Records

See Behavioural Factor Records

Contributing Factor

Add Contributing Factor Records

Edit Contributing Factor Records

List Contributing Factor Records

See Contributing Factor Records

List Client Factors

**Communications**

Bulletins

Add Bulletins

Attach a client to a bulletin

Bulletins Home Page

Close Bulletin

Display Bulletins

Edit Bulletins

List of Bulletins

Print Bulletin

Messaging

Edit Messages

List Messages

Print a Message

Read Messages

Send Messages

**HIFIS Modules**

Admissions

Access to Admission Module

Manage Rooms and Beds

Stays

List Client Stay Records

View Bed Availability

Case Management

Add Case Management Records

Comments

Add CM Comment

Display Case Management Comments

Edit CM Comment

Display Case Management

Documents

Add CM Document

Edit Case management Records

List Case Management Cases

List Client Case Management Cases

Sessions

Add CM Session

Display CM Session

Display Case Management Sessions

Edit CM Session

Clients

Add Clients

Edit Clients

List Clients

Search Client

Custom Table Records

Add Custom Table Records

Edit Custom Table Records

List Custom Table Records

Group Activities

Add Group Activities

Display Group Activities

Edit Group Activities

List Group Activities

Incidents

Add Incident Records

Display Incident

Edit Incident Records

List Incident Records

Service Restrictions

Add Service Restrictions

Display Service Restrictions

Edit Service Restrictions

List Client Service Restrictions

List Service Restrictions

Survey

Add Client Survey

List Client Survey

View Client Survey

Turn Aways

Add Turn Away Records

Display Turn Away Records

Edit Turn Away Records

List Client Turn Away Records

List Turn Away Records

View Bed Availability

**Logon**

**On The Fly Buttons**

Add Client