**The Road to HIFIS, December 7, 2021**

Hi there, and welcome to this webinar about the road to HIFIS. A story about HIFIS implementation presented by Acre Consulting.

My name is Ali Ryder and I have a master's in urban planning. I'm also the owner and founder of Acre Consulting, and I've been working in this industry for over 10 years. I'm also on the national HIFIS 4 Working Group, and I'm a coach with a Canadian Alliance of Homelessness.

Acre Consulting is my firm that was founded in 2016, specifically to help communities with HIFIS 4. I've worked with over 24 communities across Canada with their HIFIS implementation and other needs related to HIFIS 4. I guess you could say that I am the leading expert on this software. So what I'm going to do today is present to you what I've learned about HIFIS implementation so that I can help you figure out how to get it done efficiently in your community.

We're going to be using a concept today called the system development life cycle. Now this is a concept that originally derives from software development, but don't let that frighten you.

It's a really excellent project framework that can help you identify the different stages of planning that you're going to need to go through when you're doing something like implementing a new system. Now, if you were to Google this term, system development life cycle, you'll find lots of things. And depending on the different source, you'll find somewhere between five and ten different steps. But today we are going to focus on these six: Planning, Analysis, Design, Development, Implementation, and finally Maintenance.

So, step number one, Planning, is all about getting your ducks in a row. This is a really important phase and occasionally communities feel that they can just skip it, which is not something that I recommend. Basically, in step one, we are trying to make sure that we have all the proper ingredients before we start doing our project.

So one of the things that we're going to need to do is get the right people in the room. It's going to be really hard for you to move forward with your project if you don't have the appropriate decision makers participating in this process. So you're going to need to identify your core project team. This is going to be approximately three or so people, somewhere between two and five, who are going to be able to meet regularly and make decisions and have discussions related to HIFIS. Generally speaking, I think that they might even meet once a week. And I know that that frequency might seem a little daunting at first, but keep in mind, this is just for our implementation project, so it's not going to be once a week forever.

You're also going to want to obtain a legal advisor. So you're going to need some forms like data sharing agreements and consent forms and you're absolutely going to want to vet them through a legal expert. And it's really helpful to have one specific legal expert who's a little bit more knowledgeable about the HIFIS project so that you can keep going back to the same person for questions. They don't need to be part of your core project team, but they do need to be kept up to speed.

You'll also need IT support. You're going to be hosting a server. Now it is possible for you to purchase an external server space and have someone else manage the hosting that's not internal. But regardless of your arrangement, that you're going to need to acquire someone to help you set up the server and maintain the software. They also don't need to be part of the core project team, but they do need to be also kept abreast of these things.

There are going to be some periods of time where they're going to have a lot to do and then a bunch of time where you, your core project team is going to be making decisions that don't really affect them. Now, different communities have different arrangements here. I have worked with some communities where the municipalities’ IT department has been really, really involved in the project. They've even offered a project manager to help make sure things go smoothly. So this is one arrangement that you might find yourselves in. That's great, but it's not necessary to have an IT support person being part of the core project team.

You'll also need to identify the rest of your stakeholders. Now, primarily this is going to be your other partner agencies that are going to be using HIFIS. So think about all of your Reaching Home funded agencies, your provincially or territorially funded agencies and other service providers that serve homeless people. You also may need to get involved your municipal regional government and possibly other groups also. Now I recommend that you take all of these stakeholders and put together an advisory group. Now your advisory group might, will meet less frequently than your core project team, but something like once a month and so they'll still need to be available to answer questions and dedicate time to the HIFIS project. It's going to be really valuable for you to be able to call on your advisory group when you have questions like, “Hey, um, what do we think about recording incidents in HIFIS? Let's have a discussion.”

Next, you're going to need to allocate resources to your HIFIS implementation project. In particular, this is mostly going to be assigning a staff to work on the HIFIS project and making sure they have time. It's very difficult for you to get this project underway if everyone who's supposed to be working on the project is also working on a dozen other things and the HIFIS project gets deprioritized. So if you're a manager and you want to make sure that this project goes smoothly, then you should try to ensure that the core project team that you're overseeing has time available to work on this project. So that might involve taking other things off of their desk and reallocating responsibilities. You're also going to want to estimate the project and program costs. So project is for the implementation and program is after implementation and then budget for it. The most concrete cost here is going to be the server acquisition and maintenance, whatever the costs are associated with having a server and running it. But most of your costs are actually going to be staff time. So things like what happens if the server goes down at 2:00 AM on a Saturday, are you going to have a staff available? Who's on call? Who's going to be able to get the server back up and running? And you'll need support staff, things like people to train your staff and people who might be required to extract data or do some data analysis, all sorts of different ways that you can be supporting your database.

Next, again, we haven't even touched the software. Let's talk about the scope and schedule for our HIFIS implementation. So the scope is defined in a couple of different ways:

The first one is Geographically. The most common HIFIS implementation is when you have one community and they have one HIFIS implementation for the whole municipality. However, there are some arrangements across Canada where some neighboring communities have partnered up and share a HIFIS implementation to save on costs. And there are also a few places where there is a province-wide HIFIS database that everyone in the province is using.

The second question that we'll ask here about the scope is which service providers in your community will be using HIFIS. So the answer to this might seem obvious, but you, in reality, have a core group of service providers that really work with homeless populations like shelters.

And then you have a slightly larger bubble of some service providers that work with homeless clients, but also work with housed clients. And so there's a bit of a gray area as to who is going to be expected to use HIFIS and who isn't. So, it is a good idea to identify right at the beginning of the project, who you have intended to be part of the implementation and who isn't.

Now, once you identify the service providers, that will be using your HIFIS, then ask if any of them are currently using an existing HMIS or equivalent software and ask if there's any concerns there. Some of the service providers may wish to, or be required to continue using their current existing software. And that can cause trouble. Maybe you'll need to do some data migration, or you may need to come up with some sort of arrangement where service providers are actually entering data in more than one place.

Next you'll need to develop your project timeline. I know that this feels like it's a long time away, but it's a good idea to have an end goal in mind. First let's ask, are you going to be phasing your launch, or are you going to be doing it all at once? So phasing might be something like let's look at shelters for the next six months, and then once we've launched our shelters, we're going to turn our attention to housing based case management programs and they will launch six months later. Or you could do a launch that's all in one time, and then your whole community will switch over to HIFIS all at the same time.

The other question that you're going to ask is when will your launch days be? Now I know this seems like the distant future, but it can be helpful to think about things like holidays and reporting deadlines as constraints that will help shape your project. So for example, it might sound like a good idea to launch January 1st. Then you have clean data for a whole year, but then thinking about it, that means that you'll need to train people in December and then there's holidays to contend with, so maybe that won't work out so great after all. So considering the holidays, you may want to move up your HIFIS installation launch date to say December 1st, or you may want to push it back to February 1st, and then there's reporting to consider, what the funding cycles are and the dates that you'll need to report out on. So there's a lot of different ways that you can think about your launch timeline, even though it's still quite far in advance. Now this isn't set in stone. It's just good idea to have a target at this point.

Next, we are going to start talking about legal and privacy documents. The first thing that we're going to need to do is identify our HIFIS lead agency, because it's really difficult to move forward on this project if there's no clear leader. So usually, your HIFIS lead agency is your municipal government or regional government, but that is not always the case. There are some communities where it's just one of the service providers has taken the lead. Regardless of what the case is, you'll need to identify who that lead agency is. And all of the data sharing agreements are going to be between that lead agency and the other service providers. So you don't necessarily need to have all of your legal documents all solidified before you continue onto the next stages. The reason that I'm mentioning the legal and privacy stage right now is because this typically can take a long time. You'll need to develop data sharing agreements, consent forms, confidentiality and user agreements, and all of these things need to be vetted through your legal advisor and then agreed upon by your other partner agencies.

And often that involves calling board meetings and this whole process can take a fair amount of time. So, it's a good idea to start talking about and developing your legal documents right now so that it doesn't ultimately end up holding, holding up your project.

Alrighty, so now we're onto step two: The Needs Assessment. Now this is the step that we do before we start designing our software. We talk about what do our service providers need to get out of HIFIS. So, for all of your service providers, you're going to want to ask lots of questions about things like what services they offer, what programs they deliver, how many rooms or beds or units, housing units they have, what their data needs are. So do they need to be able to submit a billing invoice monthly? Do they need to be able to fill out some sort of federal funding requirement annually? What data do they need to collect and report on? You'll also need to know what different types of staff they have. So, at a shelter, this could be, you have your frontline shelter staff, but then you maybe also have a housing specialist, and that's a different type of staff. And then you may also have supervisors. You'll also want to know what your staff do on a daily basis. So things like, do they do turn-aways? Do they record case notes? Do they record who was at a meal program and when they are issuing, like, giving out food?

Now, all of these questions are asked in the ESDC’s System Mapping Tool, which is basically a big Excel document, which has lots of columns asking all of these questions. There's an accompanying guide for it and it is a great place for you to keep all of your information organized about all of your different service providers.

At a system level, you're also going to need to identify what your system needs are from the software. So you'll need to identify the different funders and what are your funding requirements.

So, that could be Reaching Home, that could be provincial funding requirements, and so on. You'll also want to identify what are your system level performance indicators that need to be monitored. So, you probably want to know things like your shelter bed occupancy, how good you are at housing people, how many movements you have each month, how many people are new to homelessness each month, and so on. You'll also need to identify whatever your system level needs are. So things like maintaining a By-Name list would be a system level need. So, you'll need to basically make a list of all of these needs so that when we move on to the design phase, then we can make sure that our solution is taking those needs into account and we'll be able to meet those needs.

Now we are moving on to step three: Design. So this is exciting. This is the part where we actually are starting to look at the software and do something with it. Now the design phase is really about the big picture. There are so many decisions that you can make about HIFIS and a lot of it is really, really nitty gritty. Like what should the options be in a specific drop down menu that only appears on one page. Now to avoid having really, really detailed discussions about, you know, the drop down menus on a page that you ultimately might not end up using, it's a good idea at this stage to focus your discussion and your design on just the really big picture.

So one of the biggest pictures that we have in HIFIS is a concept called a cluster. So, cluster is a pool of service providers that share the same group of clients. Now, depending on your community's implementation, you could set up a fully integrated HIFIS database that has one cluster and all of your service providers are sharing data within that cluster. You could, on the opposite end of the spectrum, have a completely isolated HIFIS installation, where let's say you have 10 different service providers, you would have 10 different clusters with each service provider in their own cluster. Now, in order to achieve Coordinated Access as per your Reaching Home guidelines, at a minimum, all of the service providers within a single community should be in the same cluster, but that requirement only applies to Reaching Home funded agencies.

The gold standard is for all of your service providers to be in the same cluster and that's what you should be striving towards, but there are some cases, like where you have, perhaps, a domestic violence shelter that may be unable or unwilling to share information about sensitive clients with other service providers and it may make the most sense to set them up in a separate cluster.

The next thing that we're going to want to do is take your understanding of what your staff are doing on a day-to-day basis. So what are their daily tasks, and also figure out what your data needs are. You're going to want to review the modules in HIFIS. So, modules include things like the case management module, the shelter admissions module, the service restrictions module, the group activities module, and so on. You're going to want to go through a process where you map each specific task to a specific module and fields in HIFIS. A lot of this is very intuitive.

For example, if your staff have a daily task where they book people into shelter beds, then they'll be using the shelter admissions module and using the book-in screen. So, a lot of this is very intuitive, but there's a few places where you might say, “Hey, we have a really unique situation and I'm not exactly sure where this is intended to go.” So you'll need to think about this with your project team and possibly your advisory committee, and think about the different options and then come up with an answer.

Once you've done that, you are going to assemble a collection of these specific tasks in specific modules and create user rights templates. So, a user rights template is something that you assign to a staff that basically says they have permission to use the Shelter Admissions module and use the Case Management module, but they don't have permission to access the Point in Time Count module, just as an example. So, that would be a set of user rights templates. So, the big thing that you're going to be doing here during step three, design, is coming up with these user rights templates. Now the rights templates can change over time, but it's a good idea to come up with at least a draft document here.

Now that you have your rights templates, then you can now say with a fair amount of certainty, that I know that I have eight different types of staff and they each have their own rights template

and therefore, I know which modules they will be using, and I know which screens they will be accessing. And now we're going to go and fine tune things. And that's really the development stage. We now have the high level big picture and now we're going to get down into the nitty gritty.

You're going to want to develop some policies and procedures to go along with HIFIS. Things like flushing out your data entry procedures, who, which staff enters, what data into which field and when. So, do you have expectations about data being up to the minute or is it okay if they enter it in a day or two later? You'll also want procedures about how a given module will be used. You may need a definition for when a turn away needs to be recorded or an incident. You'll need to develop policies for various circumstances, such as when a client declines to consent. They don't want their data to go into HIFIS. Will you still be able to serve them? And what's your procedure or policy for if that's the case? Data quality benchmarks, such as how up-to-date the data is expected to be, how you might handle service restrictions, and what would you do if a single service provider is required to enter information into multiple databases. There's a couple of different situations where that might be the case.

So, in this diagram, we have the green circle on the left shows our community HIFIS and it includes several agencies that will be using HIFIS. But we also have one agency in our community that is health funded. Let's imagine it is a mental health support agency, and they, they do do a housing based supports, but they're funded both by your community homelessness programs and also by health funding. And as a condition of the health funding, they're required to use a health database, but as a condition of the homeless funding they're required to use HIFIS. So you have a situation where a single agency might be required to use multiple databases. Then, we have another example down at the bottom right. Where I live in Ontario, all of the domestic violence shelters use their own software that talks to all the other domestic violence shelters. This allows them to make referrals to a nearby shelter in a different community if the current one is full. So, you may have a domestic violence shelter in your community that wants to be participating with the homeless system on coordinated access, but they're required to use this other database, because that's just the way things are done for domestic violence shelters here. And so, these are some different examples of how you might end up with a particular service provider that may be required to use two different databases at the same time.

There's a couple options of how you might handle this. On the left-hand side, you could require that everybody manually enters everything twice. This is not an ideal situation. On the far end, the complete opposite end, on the green circle, things are only in one database. So, if they're required to use the other database, whether it's a health database or domestic violence database, they put nothing in HIFIS. That's also not ideal. So, there is some room in the middle. You could have some of the staff enter many things twice, but not everything. So, for example, you may require a health funded agency to open a case file in HIFIS indicating that a particular caseworker is working with a particular client, but then not require them to enter their case notes because the case notes are in a different database. In the middle, there is an option to mostly use one database and then having a minimal data double entry, or you could pursue a technological fix where clients or, where users are only entering things in one database, and some sort of technology will copy the data from one to the other. Now, before you get too excited, please note that this does not currently exist, but it might at some point in the future, or it might be something that you can develop in-house if you have the technological skills.

So we're also going to need to handle the governance here; who is going to be responsible for administration within HIFIS? Things like adding new users, who is going to help a user unlock their account if they do that? Who is going to change dropdown menus or set up new housing units, or develop and add new reports or sending system-wide bulletins or broadcasts? There's a couple of different approaches that you can take here.

On the one hand, we can have a centralized or a decentralized approach where you sort of give all of your service providers more autonomy, give them more permissions to make administrative changes, but that can lead to a bit of a messy database and a bit of a chaotic situation.

You could take a concentrated approach where all of the power resides within the HIFIS lead agency, but that can cause some bottlenecks and slowness if only one person is responsible for making all of these changes, and what happens if they go on vacation? Most commonly, communities end up somewhere in the middle where they delegate some authority to the service providers, the partner agencies, and retain some permission to make changes exclusively with the HIFIS lead agency.

Another thing that you should consider is: who has the authority to decide on changes and how does that relate to the capability to enact those changes? So let's say that you give someone the HIFIS user rights, that they could set up a new program and so they just decide one day that they're going to start delivering a new program, but it's not something that they're funded to do. So, that's a place where you may need to come up with policies related to under what circumstances is someone allowed to use particular user rights.

Now, we're also going to want to ensure that all of our data requirements will be able to be met. There's two prongs to this. The first is, are you collecting the data that you need? So, a lot of this has to do with pieces of client information, things about the clients that you are collecting.

For example, you may be required to report out on the number of veterans who experienced chronic homelessness. Well, that requires that you ask about every client's veteran status on intake, and therefore you'll need to make sure that staff have user rights to access that piece of the software. The second prong is pulling the data out. So what reports are available? Are any custom reports required and do you have capacity to develop those? Now, the capacity to develop those custom reports might look differently in different communities. For some communities, it may mean training a staff in-house to develop your own reports and other cases, it may be hiring a consultant to develop reports for you. In some cases, it might be just borrowing liberally from every community that is possible.

Next we're going to need to fine tune a lot of things in HIFIS, things like modifying dropdown menus, defining programs, and setting those up. You can set certain fields to be mandatory, optional or disabled. You'll need to configure a lot of different areas of the software, including things like your directory of services, what rooms and beds exist, the goods and services that are offered, and so on. There's lots of decisions you'll need to make such as things like what are your password rules? When does consent expire? Will users be required to attest that they need, that they have permission to access a client file? Are you going to be enabling geographic region settings? And so on. You’ll also want to define if you're using any custom tables and questionnaires.

Before the point of no return, you're going to want to test your new system. So, there's a couple different ways that testing could look. First, you could do a dry run. So test it with some staff and no actual clients, just to have some staff come into a training lab and use a training site, tell them to do a fake book in for our clients, and then get their feedback. You can also do a pilot. Do a small test with some staff and some actual clients in the field. You could do a real world intake and see how long it takes to enter the data into HIFIS. Again, you're always going to want to collect feedback whenever you do testing, you'll want to know what worked well and what should be fixed. You're going to want to test for technology. So things like, does your technology perform as intended? Can staff do it, to do what they need to be able to do and are there barriers? So barriers might include things like, “well, I need the software to be accessible because I have a screen reader” or “I needed to work on my mobile phone and, you know, the text is too small or I couldn't click on the button” or that sort of thing. You might also test for, well, our server seemed pretty slow, it was kind of clunky to load this particular page. So those are all technological things, and then of course, you may find some bugs in the software.

The other thing that you'll want to test is for flow. Things like, does the workflow make sense for staff? Will it make their lives easier or harder? So, in general, one of your primary goals when you're launching your HIFIS implementation is to make things as easy as possible for your frontline staff, because they're the ones that are going to be using HIFIS. If they don't like it, if they think it's a huge waste of time, then you are not going to have a really successful HIFIS implementation. They're not going to see the value. They're going to only put in little bits of data and the whole HIFIS implementation is not going to be worth very much.

All right, we are finally at step five, which is Implementation, but we don't get to actually implement yet. First we need to consider training. So you're going to want to plan for initial training and also ongoing training. I usually recommend that your initial training is what's called “just-in-time training”. So it'll be taking place as soon as close to the launch as possible. The day before would be great. That means that staff will have less opportunity to forget the things before they begin using it. And then ongoing training might be like six months down the road, we have a new policy or we're changing how we're using a particular module. Or a year down the road, we're noticing that our data entry isn't very good, so we're going to issue some retraining for staff to make sure that they remember how important housing history is. So you'll want to answer questions like when and how training will be conducted, developing training materials and standards, identifying who is responsible for training. And all of this is going to go into a training plan document. You may want to consider rules for how much training each user needs and how often they need a refresher. And one question that you might want to ask is how to identify if a staff is in need of remedial training. Do you have any metrics that you would use to say, “Hmm, your data quality is not up to snuff. We've worked on it and clearly you just need to be trained again.”

There is a lot of configuration that will need to be done prior to launch. So this is on top of setting up the server, which is going to be something that your IT department is going to do.

Someone, usually it's someone on the core project team, is going to be responsible for setting up HIFIS. And this is things like configuring your user rights templates, configuring your service providers, configuring your dropdown menus, configuring your users. So who's going to be doing that and then make sure that they have enough time to do it. I usually suggest that you allocate basically two solid weeks to do nothing but HIFIS configuration, and then if you finish early, then that's great. You can go back to the things that you've been putting off for two weeks.

So I recommend that you allocate something in the vicinity of a hundred or more hours to get the software set up prior to launch day. This number is going to vary depending on how big your community is. If you only have one service provider, or three, then it'll probably take less. But if you're trying to launch for like 40 service providers, it may take even longer than that.

We're also going to need to consider our changeover strategy. So, there are four different ways that you can do the actual changeover. And by that, I mean, flipping a switch and saying “start using now.” The first is the plunge changeover, and that is sometimes also referred to as the big bang or pulling off a Band-Aid. So basically at 11:59, everyone's using the old system and at 12 o'clock, everyone starts using the new system. It's a big bang all at once. And it has, the capability for things to go horribly awry, but also it gets things over with quickly. As long as you understand that it's going to be a bit of a mess the first couple of days, then, at least you, you know, you get it out of the way.

The phased changeover is things like, okay, maybe we're going to roll out shelter A this Monday and shelter B next Monday and shelter C the following Monday. So you don't have everybody launching at the same time and you can deal with a smaller number of fires each time that you add on new service providers and new users.

There is an option for you to do something called a parallel changeover, which is where you have staff keep using their old system and enter the data into the new system at the same time.

Yes, they're double entering things. So they would keep doing that basically until you decide that the data in the new system is good enough and then you get to scrap the old system. This can be really difficult for users, but it's a good way to sort of have a redundancy in place and make sure that you're not going to lose a bunch of important data.

And then finally there is a pilot changeover, where of course, you start doing one of these things, maybe with one service provider in advance, just to see how it goes. Some other questions to consider, will you be converting any data and how will your initial data entry be handled? And by this, I mean, you're going to usually be starting with a completely blank database, but you have several existing clients and you may even have a functioning by-name list with prioritization and lots of assessments that were done for all of your clients. And you'll know their history about who's chronically homeless and who isn't, it'll take some time for your new database to contain all of that information, or at least a sufficient quantity of that information.

If you have the option, I recommend that you hire an intern or a summer student to do some data entry around your initial launch and just copy client files over, assuming that they've consented to data sharing. They can help do the data entry, which will relieve some of the pressure for your actual frontline staff. Whether or not that's an option, you may want to have some expectations laid out. Maybe on the first launch, it's sufficient for everyone to just put client names into the database, but say 30 days from now, you'll want to be able to identify which clients are chronically homeless and which ones aren't. And 60 days from the launch, you'll want every client who's chronically homeless to also have an assessment that's in your database and so on.

So you may want to put out, expectations about how that initial data entry is going to be handled.

You're going to want to have good communication about all of your expectations. This is going to be a confusing period for staff. They might not know where they're supposed to go to enter things. They may forget their training. They may forget their username and password. They may forget, you know, exactly what they're supposed to do in a particular case. And so it's a really excellent idea to have support available, especially for the first weeks. So you may want to have someone, um, on full-time support for the first couple of weeks.

Now you've launched, congratulations, but you're not done yet. Step six, the very last step in this system development life cycle is all about maintenance. So you can't just say “woohoo, we flipped the switch, now we're done. We don't have to think about HIFIS again ever.”

There are things that you will need to keep maintaining, things like providing support, so continued training. You'll need to train new staff because there will be turnover and retraining existing staff. You may need to troubleshoot issues for staff who are having difficulty. And this could range from simple things like, “I can't logged in my account is broken” to “I can't figure out where my case notes disappeared to.” You'll need to install new software updates and maintain the server, identify and communicate known bugs. So if you identify a bug, you'll probably want to report that to the HIFIS client support center, but you're also going to want to communicate it to staff so that your other staff aren't stumbling across the same bug and saying, “oh, I don't know what to do.” It's a good idea to have like a backup plan or a workaround. We know that there's a bug here, but here's what you should do instead. You'll need to continue updating existing policies and creating new ones, should the need arise and also onboarding additional service providers again, should the need arise.

Finally, data quality, your end goal is to have a database that has really high quality data in it. Now there are six dimensions of data quality that your data should be accurate, so it should match the real world. If they're a veteran in the real world, they should be a veteran and HIFIS. It should be timely, so people should be entering in the data very promptly. It should be complete. You shouldn't be missing a lot of data. It should be unique. So you want to avoid having, for example, duplicate client files. It should be valid, so not containing errors, and it should be consistent, which is a matter of training, making sure that data is always going into the database in the same way. People are entering things in the same way, even if it was multiple users doing the data entry. It's a really good idea to have a data quality plan and to periodically perform audits to ensure that your data going in is good.

All right, so with that all in mind, how do you move forward? Well, first your timeline to implementation. It depends, but in my experience, it can take communities somewhere between six months and two years to go from just starting from scratch to HIFIS implementation.

The average is somewhere around a year, but it does depend on a lot of factors. Some of your significant time constraints could be the legal and privacy. As I mentioned before, it can take a long time to develop your agreements and get all of your stakeholders to sign them.

IT – sometimes if your IT department is really swamped, it could take a long time between when you put in a request for them to acquire a new server and for them to have it all set up.

Sometimes they also want to do lots and lots of testing and they tell you it's not ready yet. We haven't performed all of the tests that we want.

Your needs assessment step – sometimes it can be very difficult to obtain the information that you need from service providers. I've certainly been in some situations where we've launched with several service providers and after the launch, they say “help, I can't get this data out,” and I will point out that it wasn't a thing that they ever told me that they needed. So then the service providers response is often something like, “well, it was obvious. We didn't tell you cause we thought you knew.” So, it can be very difficult to get all of the information that you need from service providers. It's very easy to get, say, 80% of it, but just keeping digging until you know you got everything and that can be a bit of a challenge. Finally, the design step, there is a learning curve to using HIFIS and so designing your user rights templates can take a fair amount of time.

So what are the next steps for you? First decide on your HIFIS lead agency and your scope. So are there nearby communities that you could partner with and who will host the server and become the lead agency? You'll need to decide on data sharing. Are you going to be clustered or are you going to be unclustered, and can you get all of your different partner agencies to agree to data sharing? You'll need to develop legal agreements. You don't necessarily need to develop them from scratch. There's lots of communities that have implemented HIFIS and you start by borrowing some data sharing agreements and consent forms from other communities and then just modifying them a little bit to suit your community.

You'll also need to identify all of your service providers and get a really good understanding of what services and programs they offer.

And again, you should complete the system mapping tool from ESDC. You'll also need to figure out a plan for any dual funded agencies in your community that are required to use another database. So answer questions like, will they need to double enter their data? And if so, what data? And how will they add and update your community's By-Name list? You can also explore demo.hifis.ca to learn more about HIFIS’s capabilities and explore the different modules.

Now, before I conclude this presentation, I just wanted to mention that help is available and here are some of the different resources that you can check out. One is the homeless learning hub. There's a whole section that has a ton of different HIFIS resources, including courses, but also documents. Lots of things. You should go there. It's great. You can contact the HIFIS Client Support Center. You can also check out the resource page on built for zero Canada. There's a section on this linked page that just shows a bunch of HIFIS resources. And finally, my own website, acreconsulting.ca has a blog with lots of tips and tricks and lots of free reports you can also download.

Thanks for watching my presentation and good luck with your HIFIS implementation.