

Step by Step Process for Receiving and Recording a Referral on HIFIS from Coordinated Access Regina

Receiving the Referral

1. Agency is notified of a referral from Coordinated Access Regina (CAR)
 - a. This will be received via email and will contain the necessary information for the agency to be familiar with the client. Additional information can be found on the client account on HIFIS.
2. Agency will find (search) the client on HIFIS and will attest that they can now access their profile
3. Agency will now create a Housing Placement File with status of **Housing Not Secured**.
 - a. **This will show you have accepted the initial referral from Coordinated Access Regina.**

Contacting the Client

4. Get in contact with the client.
 - a. If unable to get in contact; record attempt in Housing Placement -> Housing Placement Attempts as *Unable to Contact Client*
 - i. Record a **minimum of five attempts within a two week period** of attempts at contact
 - ii. If unable to contact client within time period. Send in Return form to CAR
 - iii. If Return is approved by CAR record this as a Housing Placement Attempt and **mark yes on "is this the final attempt?"** this will now close the Housing Placement

Accepting onto Case Load

5. Once you have successfully contacted the client and they have been accepted onto your case load you will now **Create a Case Management File** on HIFIS.
 - a. This is where you will record any client interactions and case work such as creating a case plan, assisting with applications, providing transportation etc.

Case Management

6. Case Management is now used to record all sessions and activities provided to the client
 - a. Ensuring an accurate record of the work that you are doing creates a complete picture of the help being given to a client

Searching for Housing

7. Continue to use Housing Placement, however instead of recording contact attempts you will now use the Housing Placement Attempts form to record any attempts at obtaining housing.
 - a. Housing Placement attempts are situations where you applied for housing and it was denied. Ex. Application was denied

Housing Has been Found.

8. You have now found accepted housing for the client
 - a. Record on HIFIS under Housing Placement -> Find and Secure a Housing Unit. Enter in all necessary information including address.

- b. Housing Placement Status is now **Housing Secured**
** Please note this does not mean a client is in housing. Only that housing has been found, they still need to be moved into housing **

Client has Moved in

- 9. Client Moved In
 - a. Record the Move in on HIFIS by clicking on the **Move In** button in Housing Placement
 - i. This changes the Housing Placement status to **Moved In**
 - ii. Add a scheduled Follow-Up Date of 3 months
 - b. Housing History will automatically update with the given address from the move in
 - c. Client will now be showing as Housed on HIFIS and will be removed from the By-Names List.

Follow-Ups

- 10. You will now record follow-ups under Housing Placement -> Follow-Ups
 - a. Follow-ups begins from the move in date.
 - i. Ex. Housed in October, Then three month follow up would show in January
 - ii. HIFIS will record Months Elapsed since client has moved into Housing.
 - iii. **Add a Follow-up Date for 3 months. This will automatically schedule your next follow-up**
- 11. Required follow ups
 - a. Recording the following follow-ups are required: 3, 6, 9 and 12 months
 - b. In follow-ups
 - i. Upon adding a follow-up HIFIS will ask you if that client is still in housing.
 - 1. If yes
 - a. Add any necessary comments
 - b. **Add a Follow-up Date for 3 months. This will automatically schedule your next follow-up**
 - 2. If no
 - a. Indicate if all clients still in housing
 - i. If one individual left the housing that can be shown here
 - ii. If all clients have left housing, this will close the Housing Placement
 - b. The reason left Housing.
 - c. If Housed Elsewhere (Yes/No)
- 12. To View your Upcoming Follow-ups
 - a. Front Desk -> Housing -> Housing Placements
 - b. Click the Button called "Past Due/Upcoming Follow-ups" this will filter to show only Housing Placements with an upcoming Follow-Up
 - i. Button will only show if you have any follow-ups upcoming. If you do not, you will not see the button.
 - ii. You will also not see the button if you do not **schedule your follow-ups on HIFIS.**

Graduating a Client

13. Once all follow-ups have been completed with a client on HIFIS (3, 6, 9 and 12 months) and the client remains housed they are now considered to have graduated to independent living.
14. You are now able to close the file and graduate the client
 - a. Housing Placement -> Follow-Ups
 - b. Is this the Final Follow-Up -> Yes
 - c. All Clients Still in Housing -> Yes – Graduated to Independent Living
 - d. Add any comments and Save the file
15. Close the Case Management File
 - a. Case Management -> Edit
 - i. Under **Details** change status from Open to “Closed – Success” or “Closed – Goals(s) not met”
16. Notify Coordinated Access of the Graduation so that it is recorded appropriately in the clients file.

Returning a Client

17. Clients cannot be returned without **first submitting the Return form** to Coordinated Access Regina and **receiving approval** via email of the Return
18. When you receive approval from Coordinated Access Regina regarding the acceptance of the Return you can now proceed with closing the file
 - a. If Housing Placement is : *Housing Not Secured or Housing Secured*
 - i. At the bottom of the Housing Placement, there is a “End Housing Placement” button. Clicking this will end the Housing Placement
 - b. If Housing Placement is : *Moved into Housing*
 - i. Add Follow-Up -> Final Follow-up = Yes
 - ii. All Clients Still in Housing
 1. Yes -> Add Comments and Save
 2. No -> Add Clients that have left Housing
 - a. Reason Left Housing
 - b. Save and Close the Housing Placement
19. Close the Case Management File
 - a. Case Management -> Edit
 - i. Under **Details** change status from Open to “Closed – Success” or “Closed – Goals(s) not met”

Rehousing a Client

For nearly all cases, having two Housing Placement Files open for a client is an error, however in the case of rehoused a client – having two files can happen.

If you have housed an individual, and during that time something has happened that has caused the necessity to rehouse them (ex. Housing not suitable etc.). In this case, having a second Housing Placement is an appropriate way to record that effort. This is done as follows:

If your client is currently housed and is moving directly into new housing:

20. This can only show correctly if the **current Housing Placement** is at the status of **Moved Into Housing or Follow-ups Completed**
21. Create a New Housing Placement
22. Follow through the process of a new Housing Placement
 - a. When New Housing has been found and **Secured on the new Housing Placement** the old/original Housing Placement must be ended.
 - i. Follow-Ups -> Final Follow-Up = Yes
 1. All clients Still in Housing = No
 2. Reason Left Housing = Client Rehoused
23. Move Client into the new Housing through Housing Placement

If your client was housed, then returned to homelessness and you are searching for new housing.

24. Ensure that the Housing Placement is ended (Status = *Housing Placement Failed* or *Follow-Ups Completed*)
25. Update Housing History to show recent housing.
26. Begin a new Housing Placement and follow through with steps as per step 7 and onwards.

HIFIS Checklist – on Case Load:

- Received via Referral from Coordinated Access
- Housing Placement is accurate to current Housing Status
 - Follow-Ups being done through Housing Placement
- Client is Active on HIFIS (Interacted with in the last 90 days)
- Consent does not expire within the next three months (Obtain new consent if necessary)
- Case Management Case file is open and being used to record sessions and activities being done with the client

HIFIS Checklist – Returning a client to CAR (Once you have received approval)

- Approved Return from Coordinated Access Regina
- Housing Placement is closed.
 - Status is “Follow-Ups Completed” or “Housing Placement Failed”
- Case Management File is Closed – *if client was accepted onto caseload.*
 - Status is “Closed – Success” or “Closed – Goal(s) not met”

