HIPSK HIFIS Manual
Last Update: December 30, 2022

1. Introduction

The Homeless Individuals and Families Information System (HIFIS) 4.0 is a comprehensive web-based data collection and case management system built by the Government of Canada in consultation with community stakeholders. By using HIFIS, communities acquire the ability to adopt a coordinated service model, support the daily operations of providers, and streamline activity reporting. HIFIS also allows communities to collect homelessness sector information, which can be analyzed to influence micro and macro level decision-making, inform policy, and support broader community planning and development.

Homelessness Information Partnership Saskatchewan (HIPSK) is a partnership of agencies in Regina, Saskatoon, and Prince Albert with a shared vision: the use of a single HIFIS to better understand the state of homelessness and the supports required to reduce and prevent homelessness in Saskatchewan. To support this vision and the implementation of HIFIS, which is a requirement of Reaching Home, the DC Community Entities appointed Saskatoon Housing Initiatives Partnership (SHIP) as the HIFIS Lead Organization to lead this project.

SHIP developed this manual through consultation with the agencies that will be using HIFIS to support their operations and to better understand the nature of homelessness in Saskatchewan. This manual aims to guide HIFIS use by providing guidelines, requirements, responsibilities, processes, and procedures governing the use of HIFIS in by all parties to the HIPSK.

2. Key Concepts

2.1. Clusters

Clusters were developed in HIFIS so that service providers and their clients can be separated into different groups. Clients served by service providers in a cluster can only be viewed by service providers in that same cluster.

To coordinate service transitions and minimize data collection for individuals and families experiencing homelessness who move between Designated Communities in Saskatchewan, the HIPSK currently uses one integrated cluster for its three participating communities. Client Records form a shared pool and Client information may be accessed and worked with by an Authorized User for a Participating Agency who serves the Client if that staff has permission to do so.

Clients whose information should not be shared outside of a HIFIS Service Provider, including Clients experiencing family and domestic violence that are accessing services that also serve non-DV clients, are manually designated as private in the HIFIS Platform using the consent type Declined-Anonymous. Only the HIFIS Coordinators and Authorized Users who support the program or service being accessed by the client will have the ability to find and access client records with this consent type. The client will not be added to the By-Name List or community list subsets. The service provider delivering services to the client can otherwise perform intake, find, and work with the client's file in HIFIS as it normally would.

Additional Clusters may be utilized in the future for DV-specific programs or agencies.

2.2. Data Sharing

HIFIS 4 enables HIPSK agencies to move towards a shared service model. Clients who consent to share will have one file in the system. All service providers that serve a client will be able to access and work with the client's file. Yet not all records attached to a client file are shared with all users. There are several ways in which HIFIS limits access to information to users.

2.2.1. HIFIS Service Provider

HIFIS Service Providers refer to an organized and logical 'set of services' provided to clients. Users are only able to log in to the HIFIS Service Providers that are set up for the services they deliver. When a user records information in HIFIS, that records is 'attached' to the HIFIS Service Provider they are logged in to. In general, HIFIS Service Providers refer to one program or a set of related programs and that delivered by one agency, and which serve the same group of clients.

Example 1: An agency runs two shelters at distinct sites – a shelter for adult clients and a shelter for women and their children, and youth. Each of these shelters would be set up as its own HIFIS Service Provider.

Example 2: An agency runs a shelter for women and a shelter for men. Both shelters are located at the same site, and the same staff generally serve clients at both the women's and men's shelter. The two shelters are set up as one HIFIS Service Provider so that staff do not have to 'switch' between service providers to deliver services to clients.

2.2.2. Type of Information

HIFIS generally separates information into two categories: Client Information and Client Management.

Client Information includes demographic information that is shared by all service providers and includes information for the categories below:

- Vitals
- Contact Information
- Physical Appearance**
- Profile Picture**
- Languages
- Consent
- Documents
- Education

- Family
- Incomes
- Medication*
- Dietary Requirements*
- Housing History
- Contributing Factors
- Behavioural Risk Factors
- Life Events

* These categories are manually restricted. Users are instructed to enter this information in a way that reflects this, and reports are periodically run to ensure that information under these sections is non-shared.

** These categories are restricted to certain groups of users. Profile Picture and Physical Appearance is restricted so that only shelters can collect and share a picture or a physical description of the client for the purposes of security at their sites.
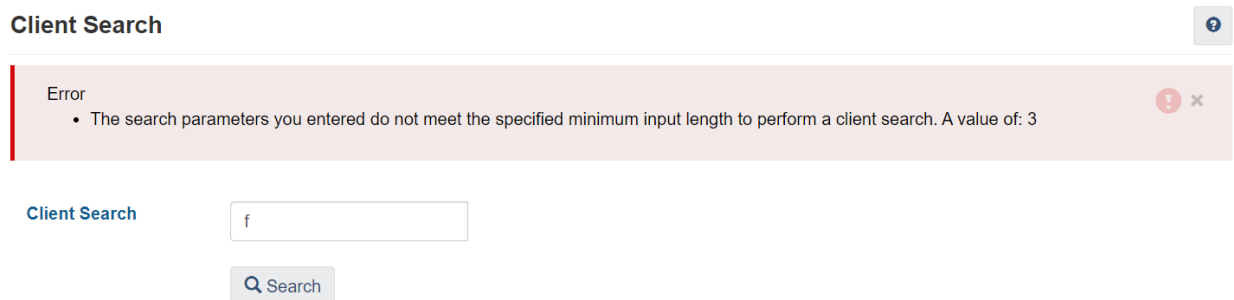
Client Management contains records of activities and services performed by the service providers. The detailed records in the section are viewable only by staff at the service provider where the activity/service was performed, and includes items in the following categories:

- Admissions
- Appointments
- Calls and Visits Logs
- Case Management
- Chores
- Goods and Services
- Group Activities

- Housing Placements
- Incidents
- Medication Dispensing
- Service Restrictions
- Storage
- Surveys
- SPDAT

Staff who work with the client can see basic summary information for the activity/service recorded by another service provider if they have access to that module; however, they are unable to view the detailed records recorded by other service providers. The example below shows what Service Restriction information is shared between service providers that use this module.

2.2.3. Restricting Client Search

This privacy setting is used so that users cannot browse through a list of client names. Instead, users must search by client name or file number using a minimum of three characters to display client records that meet the search criteria. If fewer than three characters are searched, an error message will display.

Client Search

> Error
> - The search parameters you entered do not meet the specified minimum input length to perform a client search. A value of: 3

Client Search   [f   ]

[🔍 Search]

2.2.4. Demographic Visibility Settings

HIFIS Service Providers are generally configured to view only those Clients who are eligible (based on gender and age) for their services/programs.

Example 1: An agency only serves adult men, which they define as 18 and over. An Authorized User logged in to a HIFIS Service Provider for this agency will not be able to access Client Records for women or anyone under the age of 18.

In situations where staff serve Clients across more than one HIFIS Service Provider at a common site, visibility settings are inclusive to enable staff to easily determine whether a client has been added to the system.

Example 2: Agency staff at a large site with multiple HIFIS Service Providers generally work with all Clients regardless of which HIFIS Service Provider is serving them. The records of children, youth, and adult women are therefore visible to all staff at the facility, regardless of which HIFIS Service Provider they are logged in to.

Adult Man = 18+

Adult Woman = 18+

Youth = 16-17

Child = 0-15
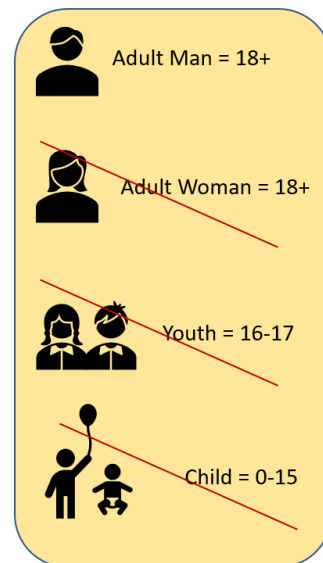
2.2.5. Declined-Anonymous Consent

When a new client record is created in HIFIS, the client has the option to provide full consent or to provide partial consent. If a client has a safety concern and their information should not be shared outside of the current service provider serving them, they should be advised to provide partial consent by only initialing the first box on the HIFIS & By-Name List Consent Form. Clients who provide partial consent will be added into HIFIS under the consent type 'Declined-Anonymous'. As a result, the client's record will be hidden to other service providers.

2.2.6. Hidden Clients

On the Client Vitals screen, a Client can be manually toggled from Visible to Hidden. The user right for this setting is limited to the HIFIS Coordinators.

This setting is reserved for the following situations: 1) A client has been entered into HIFIS without providing consent; 2) a client has been added to HIFIS with Coordinated Access + Explicit consent when they have not provided full consent by initialing both boxes on the Consent Form; or 2) a Client has been added to the HIFIS Platform with Coordinated Access + Explicit consent, but that consent type is not appropriate due to safety concerns.

Super Users are responsible for informing the HIFIS Coordinator when a Client should be moved from Visible to Hidden. Client records that are moved to Hidden can no longer be accessed or used.

2.2.7. User Rights

Each Authorized User has a series of permissions or user rights that govern what portions of the HIFIS Platform they can access. User rights are organized into rights templates. These templates can be applied to multiple Authorized Users that generally perform the same job duties. In general, there are five potential rights that an Authorize User might have regarding a particular area or HIFIS module. These are:

      i.   List Records

      ii.   Display Record

      iii.   Add Record

      iv.   Edit Record

      v.   Delete Record

The pre-requisite permission is List Records (for example, "List Clients" or "List Turnaways", which grants an Authorized User access to that HIFIS module). The List Records permission simply lists the record in that HIFIS module. It also provides a limited amount of information about that record.

To access a complete record, an Authorized User must be given Display Record permissions. The ability to Display a Record grants access to all fields within that record. For example, if an Authorized User has permission to List Clients, they can view the Client List, which shows the names of all (visible) Clients. Clicking on a Client's name will open the Client's file, which can be done by Authorized Users with the permission Display Clients.

1.1. Client Consent

When a new client record is created in HIFIS, the client's consent information must be entered, and their signed form uploaded to HIFIS. The consent ensures clients are made aware of the ways their information will be shared and used before agreeing to give their information. The consent also confirms service providers are complying with privacy laws.

The three options for consent type are Coordinated Access+Explicit, Inherited, and Declined-Anonymous. Explicit is a consent type that is listed as a system requirement at the time of writing, but which is not used by the HIPSK.

2.2.8. Consent Types

Coordinated Access + Explicit
This consent type indicates that the Client is interested and engaged in Coordinated Access services and has provided full consent by initialing both boxes on the HIFIS & By-Name List Consent Form: Consent to Collect and Consent to Share. This consent is collected from clients who are sixteen years of age or older.

Inherited
This consent type only applies to dependents under the age of sixteen who are receiving services as a part of a family. This consent is provided on the child's behalf by the family head when they sign the HIFIS and By-Name List Consent Form and has the same effect as Coordinated Access+Explicit consent.

Declined-Anonymous
This consent type makes a client and their information private to the HIFIS Service Provider who created their HIFIS file. The client cannot be found in the system by other HIFIS Service Providers, and their stay information is listed as 'Private Service Provider.' This type of consent is provided if:

- The client has immediate safety needs and requires that their information or their family's information is kept private;

- The client only initials the first box on the Client Consent Form; or

- The client refuses any information collection whatsoever (see 2.3.2. Declining Clients).

The Declined-Anonymous consent type limits a community's ability to collectively support an individual or family and compromises community-level data. Clients who do not have safety concerns should be encouraged to provide full consent.

Coordinated Access+ Explicit	Inherited	Declined-Anonymous
Collect & Store	Collect & Store	Collect & Store
Share	Share	
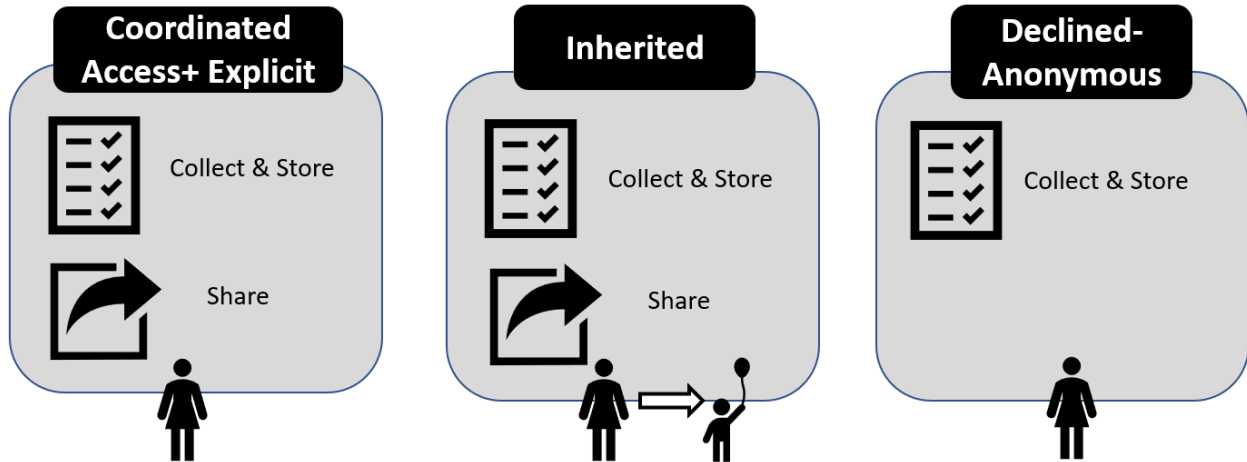
Explicit
This consent type is not used by the HIPSK because our consent form bundles consent to share information with consent to be added to the By-Name List. Clients who provide full consent should be entered into HIFIS as Coordinated Access + Explicit. If a staff member accidentally adds a client as Explicit instead of Coordinated Access + Explicit, a record of Coordinated Access should also be added to resolve the error.

2.2.9. Declining Clients

Occasionally, a client may refuse to have their information collected and/or stored in a non-shared way in HIFIS or may completely refuse to share any of their personal information with an agency. Information about these clients should not be added to HIFIS. For agencies that need a way to indicate that a bed is being used in HIFIS by a declining client so that another client is not booked in, pre-populated dummy files have been created in HIFIS. These dummy files may be used to book clients in and track funding without entering any identifying information into HIFIS. Several dummy files exist for select HIFIS Service Providers that use rooms and bed to account for a situation where more than one declining client is booked in to the same shelter at once. These files follow the format ANON1_ServiceProviderName, ANON2_ServiceProviderName, etc.

2.2.10. Period of Consent

Consent automatically expires after 365 days. Clients may cancel their consent at any time by completing a Withdrawal of Consent Form at any HIPSK Agency. HIPSK Agencies are required to submit Withdrawal of Consent Forms to the HIFIS Coordinators for processing.

If full consent is provided (Coordinated Access+Explicit or Inherited consent), the client's record will be available to users at other HIFIS Service Providers. Consent automatically expires after 365 days.

Consent is collected by one HIFIS Service Provider on behalf of all HIPSK agencies.

2.3. Attestation and Enforced Consent

Prior to viewing and working with a client record that has been created by another HIFIS Service Provider, one user from the HIFIS Service Provider will be asked to attest that they have a valid reason for accessing the record. Attestations are 'logged' and can be reviewed by supervisors/managers and Super Users to help ensure that staff are only accessing the records of clients they are serving. Attestation is not required for HIFIS Service Provider that initially creates a client record but is required for every other HIFIS Service Provider that attempts to access the client's record.

If a client's Consent Type is Inactive because their consent has expired or they have cancelled it early, their file may or may not be accessible to users at that Service Provider. If a user at a Service Provider has provided Attestation, all users logged in to that Service Provider will be able to discover the record (i.e., search and find the record), access the record (i.e., enter it); however, they will not be able to modify the record (i.e., edit the record) until a new consent has been recorded for the client.

If Attestation has not been recorded previously (i.e., the client has not previously accessed services under that Service Provider), users at that Service Provider will only be able to discover the record. They will not be able to access or modify the record until a user at that Service Provider has provided Attestation and recorded a new consent for the client.

Consent Status: Inactive

Attestation   No Attestation

Service Provider 1

Service Provider 2

Discoverable   Accessible   Not modifiable

Discoverable   Not Accessible   Not modifiable
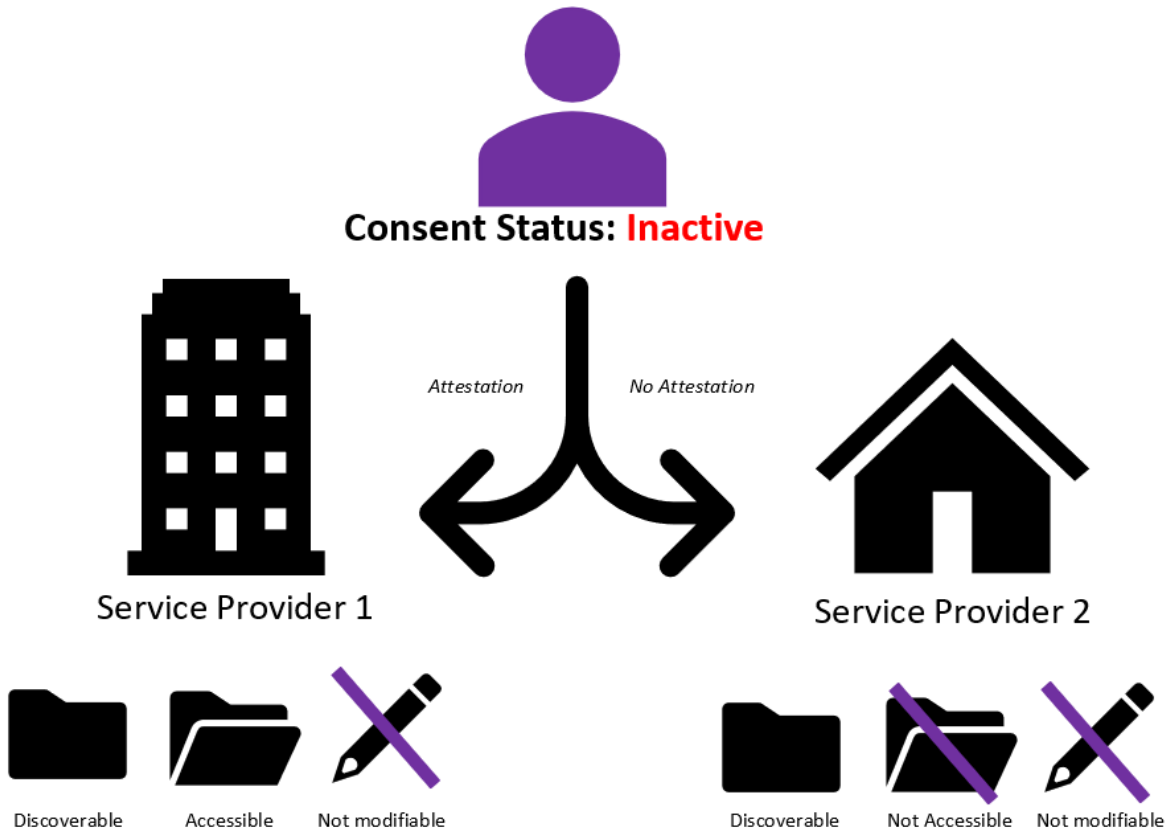
3. Data Collection & Sharing

3.1. Client Information

Client personal information in HIFIS is generally shared between all services providers. Information under this section and can be accessed by a user when they enter a client's record if their User Rights provide that access. The data points marked as 'collected' and 'shared' in the table below indicate that at least one User Rights template for a staff role supports the collect and sharing of that data point.

The date points collected and shared as listed in the table below are subject to change.

Data Point	Collected	Shared	*Notes
Client Details			
➢ Dashboard			
Consent Status	Auto	✓	
Client State	Auto	✓	
Housing Status	Auto	✓	
File Number	Auto	✓	
Gender	✓	✓	
Date of Birth	✓	✓	
Family in HIFIS (Y/N)	✓	✓	

Profile Picture	✓	*	Collected/shared by shelters only.
➢ Client Vitals			
Consent Status	✓	✓	
Last Name	✓	✓	
First Name	✓	✓	
Middle Name	✓	✓	
Alias 1	✓	✓	
Date of Birth Known	✓	✓	
Date of Birth	✓	✓	
Gender Type	✓	✓	
Disability*	✓	✓	Y/N toggle field used to indicate mobility issue.
Medic Alert	✓	✓	
Veteran Status	✓	✓	
Citizenship/Immigration Status	✓	✓	
Indigenous Status	✓	✓	
Geographic Region	✓	✓	
File Number	✓	✓	
Country of Birth	✓	✓	
Province/Territory of Birth	✓	✓	
City of Birth	✓	✓	
Housing History	✓	✓	
➢ Physical Appearance			
Client Height	✓	✓	Collected/shared by shelters only.
Client Weight	✓	✓	
Hair Colour	✓	✓	
Eye Colour	✓	✓	
➢ Distinguishing Features			
Feature	✓	✓	Collected/shared by shelters only.
Description	✓	✓	
➢ Contact Info			
Means of Communication	✓	✓	
Value (phone number, etc.)	✓	✓	
Extension	✓	✓	
➢ Language			
Language	✓	✓	
Service Language	✓	✓	
➢ Comments			
Date Created	✓		Used to privately record Emergency Contact. Record must be manually saved to No.
Author	✓		
Subject	✓		
Replies	✓		
Review	✓		
Comments	✓		
Consent Type			

Consent Type	✓	✓	
Consent Start Date	✓	✓	
Consent End Date	✓	✓	
Attachment (Consent Form)	✓	✓	
Comments	✓	✓	
Contact List			
Contact Name			
Relationship			
Phone			
Email			
Documents			
Attachment	✓	✓	Files marked *Confidential* are shared w/ designated users only.
Name of Uploaded Document	✓	✓	
Confidential*	✓	✓	
Description	✓	✓	
Eduction			
School	✓	✓	
Education Level	✓	✓	
Completed	✓	✓	
Start Date	✓	✓	
End Date	✓	✓	
Comments	✓	✓	
Family			
Family Member Name	✓	✓	
Family Role	✓	✓	
Relationship to family member	✓	✓	
Family Head	✓	✓	
Start Date	✓	✓	
End Date	✓	✓	
Income			
Income Type	✓	✓	Sharing must be manually set to Yes when record is saved.
Pay Frequency	✓	✓	
Hours per month	✓	✓	
Hourly wage	✓	✓	
Start Date	✓	✓	
End Date	✓	✓	
Primary	✓	✓	
Expenses			
Expense Type	✓	✓	
Pay Frequency	✓	✓	
Monthly Expense	✓	✓	
Start Date	✓	✓	
End Date	✓	✓	
Essential	✓	✓	

Asset			
Asset Type	✓	✓	
Amount	✓	✓	
Country	✓	✓	
Start Date	✓	✓	
End Date	✓	✓	
Description	✓	✓	
Debt			
Debt Type	✓	✓	
Amount	✓	✓	
Country	✓	✓	
Start Date	✓	✓	
End Date	✓	✓	
Description	✓	✓	
Health Information			
➢ Health			
Health Issue			
Start Date			
End Date			
Description			
Self-Reported			
Suspected			
Diagnosed			
Contagious			
Symptoms			
Medication			
Treatment			
➢ Medication*			
Medication Name	✓	*	Sharing must be manually set to No when record is saved.
Health Issue	✓	*	
Pharmacy	✓	*	
Prescriber	✓	*	
Recurrence	✓	*	
Dosage	✓	*	
Maximum Number of Dose per Day	✓	*	
Start Date	✓	*	
End Date	✓	*	
Initial Pill Count	✓	*	
Fulfillment Date	✓	*	
Refill Date	✓	*	
Disposal Method	✓	*	
Comments	✓	*	
➢ Dietary Requirements			
Dietary Requirement	✓	✓	
Category	✓	✓	

Food Item	✓	✓	
Avoided	✓	✓	
Active	✓	✓	
Housing History			
Housing Type	✓	✓	
Start Date	✓	✓	
End Date	✓	✓	
Place Name	✓	✓	
Address Line 1	✓	✓	
Address Line 2	✓	✓	
Unit / Apartment Number	✓	✓	
Country	✓	✓	
Province / Territory	✓	✓	
City	✓	✓	
Postal Code	✓	✓	
Geographic Region	✓	✓	
Rent	✓	✓	
Telephone 1	✓	✓	
Extension	✓	✓	
Telephone 2	✓	✓	
Mobile Phone	✓	✓	
Email	✓	✓	
Identification			
Identification Type			
Expiry Date			
Identification Number			
Description			
Attachment			
Indigenous Status			
Indigenous Status	✓	✓	Collected/shared with all agencies from Vitals
Province/Territory			Use by Indig. Agencies pending resolution of error
Band Name			Use by Indig. Agencies pending resolution of error
Treaty Number			
Home Reserve			
Various Factors			
➢ Contributing Factors			
Contributing Factor	✓	✓	
Start Date	✓	✓	
End Date	✓	✓	
Comments	✓	✓	
➢ Behavioural Factor			
Behavioural Factor	✓	✓	
Start Date	✓	✓	

End Date	✓	✓	
Severity	✓	✓	
Comments	✓	✓	
➢ Watch Concerns			
Behavioural Factor			
Start Date			
End Date			
Severity			
Comments			
➢ Life Event			
Start Date	✓	✓	
End Date	✓	✓	
Vehicle			
Make			
Model			
Year			
Colour			
License Plate			
Start Date			
End Date			
Veteran Service			
From			
To			
Element			
Rank			
Reason for Being Discharge from Service			
Armed conflict			
Role			
Other Service details			
VAC Caseworker			
Veterans Service Number			
Comments			

3.2. Client Management

Service-related information in HIFIS is either not shared between services providers, or sharing is limited to summary-level information. Information under this section can be accessed by a user when they enter a client's record if their User Rights provide that access. The data points marked as 'collected' and 'shared' in the table below indicate that at least one User Rights template for a staff role supports the collect and sharing of that data point.

Some service providers have opted out of using modules that will not effectively support their operations (e.g., Medication Dispensing, Call and Visit Log, etc.). Certain modules are accessible from the Front Desk menu only where it has been determined that summary service-related information does not

need to be shared between service providers (e.g., Incidents are not shared between service providers).

Data Point	Collected	Shared	*Notes
Admissions			
➢ Book In			
Client Name(s)	✓	✓	
Start Date and Time	✓	✓	
Expected Bookout Date	✓		
Reasons for Service	✓	✓	
Program	✓		
Evacuation Assistance Required	✓		
Referred From	✓		
Referred By	✓		
Late Pass Time	✓		
Wake Up Time	✓		
Intoxicated	✓		
Comments	✓		
➢ Book Out			
Service Provider	✓	✓	
Room	✓	✓	
Bed	✓	✓	
Start Date and Time	✓	✓	
Reason for Service	✓	✓	
Book Out Date and Time	✓	✓	
Reason for Discharge	✓		
Referred To	✓		
Comments	✓		
➢ Reservation			
Client Name (s)	✓	✓	
Start Date and Time	✓	✓	
Expected Book out Date	✓		
Reservation Status	✓		
Reason for Service	✓	✓	
Referred From	✓		
Referred By	✓		
Comments	✓		
➢ Create Historical Stay			
Start Date and Time	✓		
Book Out Date and Time	✓		
Bed	✓		
Reason for Service	✓		
Reason for Discharge	✓		
Program	✓		
Referred From	✓		

Referred To	✓		
Referred By	✓		
Comments	✓		
Appointment			
Appointment Type			
Location			
Description			
With			
Followed Through			
Start Date and Time			
End Date and Time			
Comments			
Bulletin			
Subject	✓		
Priority	✓		
Client Name (s)	✓		
Requested By	✓		
Owner	✓		
Service Provider	✓		
Start Date	✓		
End Date	✓		
Bulletin Content	✓		
Call and Visit Log			
Log Type			
Type			
Nature of Contact			
Subject			
Date and Time			
Name			
Ex-Resident			
Duration Hours			
Duration Minutes			
Geographic Region			
Comments			
Case Management			
➢ Add Case (Details)			
Client Name	✓	✓	
Family Members	✓	✓	
Case worker	✓	✓	
Goal	✓	✓	Goal is 'General'
Status	✓	✓	
Start Date	✓		
Target date	✓	✓	
Program	✓	✓	
Contributing Factor	✓		
Total Expended Time	✓		

Total Elapsed Time	✓		
➢ Add Session			
Goal	✓		
Activity	✓		
Description	✓		
Date and Time	✓		
Expended Hours	✓		
Expended Minutes	✓		
Caseworker	✓		
Responsibility	✓		
Agency Involved/Referral	✓		
Client Present	✓		
Family Present	✓		
➢ Document			
Document	✓		
Case Comment			
Subject	✓		
Comments	✓		
➢ Chore			
Stay Information	✓		
Chore Type	✓		
Start Date	✓		
End Date	✓		
Description	✓		
Expended Hours	✓		
Expended Minutes	✓		
Conflict			
Conflict Type			
Client Is			
Counterpart Name			
Counterpart Is			
Intensity			
Start Date			
End Date			
Probability			
Relationship			
Location Type			
Referred From			
Referred To			
Comments			
Food Bank			
Start Date and Time			
Reason for Service			
Program			
Referred By			
Referred From			

Referred To			
Case Management Activity			
Number of Individuals			
Good and Service			
➤ Good and Service Transactions			
Reason for Service			
Start Date and Time			
Program			
Case Management Activity			
Number of Individuals			
Referred From			
Referred To			
Referred By			
Reason for Service			
➤ Express Good			
Good			
Program			
Unit of Measure			
Unit Price			
Reason Service			
Comments			
➤ Express Services			
Service	✓	✓	
Program	✓		
Reason for Service	✓		
Expended Hours	✓		
Expended Minutes	✓		
Referred To	✓		
Comments	✓		
Date	✓	✓	
Group Activity			
Group Activity			
Program			
Location			
Start Date and Time			
Expended Hours			
Expended Minutes			
Description			
Reason for Service			
Referred From			
Referred To			
Housing Loss Prevention			
Client Name	✓	✓	
Start Date	✓	✓	
Case worker	✓	CHECK	
Status	✓	✓	

Housing Placement			
Caseworker	TBD	TBD	
Housing Type(s) sought	TBD	TBD	
Search Start Date	TBD	TBD	
Target Date	TBD	TBD	
Program	TBD	TBD	
Incident			
Involved	*		*All listed fields are collected from the Front Desk menu only.
Witnesses	*		
Emergency Services	*		
Nature of Incident	*		
Date and Time	*		
Location	*		
Disposition	*		
Attachments	*		
Comments	*		
Medication Dispensing			
Dispensing Date	✓		
Dispensed By	✓		
Time (All,Morning,Non,Evening,Bed time,PRN)	✓		
Medication Name	✓		
Dosage	✓		
Dispensed Today	✓		
Program			
Service Provider			
Module Name			
Program Name			
Date			
Service Restrictions			
Requested By	✓		
Start Date and Time	✓	✓	
End Date and Time	✓	✓	
Service Providers	✓	✓	
Modules	✓	✓	
Reason for Restriction	✓	✓	
Comments	✓		
SPDAT			
➢ VI-SPDAT Intake 1 & 2			
Caseworker	✓		Available to one agency that previously used VI-SPDATs to assess clients.
Start Date and Time	✓		
Pre-Screen Period	✓		
Consent	✓		
Program	✓		

Description	✓		
Score	✓		
➢ Questioner Questions			
History of Housing and Homelessness			
Risks			
Socialization and Daily Function			
Wellness			
Question			
Answer			
Refused			
➢ F-VI-SPDAT Intake 1 & 2			
Client Name	✓		Available to one agency that previously used VI-SPDATs to assess clients.
Caseworker	✓		
Start Date and Time	✓		
Pre-Screen Period	✓		
Pregnancy	✓		
Consent	✓		
Program	✓		
Description	✓		
❖ Questioner Questions			
History of Housing and Homelessness			
Risks			
Socialization and Daily Function			
Wellness			
Question			
Answer			
Refused			
➢ New Tay-VI-SPDAT version 1 Intake (Youth VI)			
Client Name			
Caseworker			
Start Date and Time			
Pre-Screen Period			
Consent			
Program			
Description			
❖ Questioner Questions			
History of Housing and Homelessness			
Risks			
Socialization and Daily Function			

Wellness	▨	▨	
Question	▨	▨	
Answer	▨	▨	
Refused	▨	▨	
➢ SPDAT Version 3 intake (3 & 4)			
Client Name	✔	✔	
Caseworker	✔	✔	
Start Date and Time	✔	✔	
Assessment Period	✔		
Consent	✔		
Program	✔		
Description	✔		
Score	✔	✔	
SPDAT Type	✔	✔	
❖ Questioner Questions			
Socialization and Daily Function	✔	▨	
Risks	✔	▨	
Wellness	✔	▨	
Risks	✔	▨	
History of Housing and Homelessness	✔	▨	
Question	✔	▨	
Answer	✔	▨	
➢ F-SPDAT Intake 1 & 2			
Client Name	✔	✔	
Caseworker	✔	✔	
Start Date and Time	✔	✔	
Assessment Period	✔		
Consent	✔		
Program	✔		
Description	✔		
Score	✔	✔	
SPDAT Type	✔	✔	
❖ Questioner Questions			
Socialization and Daily Function	✔		
Risks	✔		
Wellness	✔		
Risks	✔		
History of Housing and Homelessness	✔		
Family Unit	✔		
➢ New Y-SPDAT Version 1 Intake			
Client Name	✔	✔	
Caseworker	✔	✔	

Start Date and Time	✓	✓	
Assessment Period	✓		
Consent	✓		
Program	✓		
Description	✓		
Score	✓	✓	
SPDAT Type	✓	✓	
❖ Questioner Questions			
Wellness	✓		
Risks	✓		
Socialization and Daily Function	✓		
History of Housing and Homelessness	✓		
Storage			
Item	✓		
Stored Location	✓		
Start Date	✓		
End Date	✓		
Comments	✓		
Survey			
Survey	✓	✓	
Service Provider	✓	✓	
Date Taken	✓	✓	
Turn Away			
Family Members	✓		Turn Aways are available from the Front Desk menu only. From the Front Desk menu, Turn Aways can be recorded for known clients and anonymous clients.
Effective Date & Time	✓		
Number of Adults	✓		
Number of Children	✓		
Reason for Service	✓		
Reason for Turn Away	✓		
Requested By			
Referred By			
Referred From	✓		
Referred To	✓		
Comments	✓		
VAT Intake			
Caseworker			
Start Date and Time			
consent			
Program			
Attachments			
Description			
❖ Questioner Questions			
Vulnerability Assessment Tool Questions			

Question			
Answer			
Waiting List			
Waiting List Name			
Start date			
End date			
Priority			
Reason for Being on List			
Status on waiting List			
Status date			
Comments			

3.3. Front Desk

Information available from the Front Desk menu lists client records recorded at the service provider the user is currently logged in to for the relevant module. Service information recorded by other Service Providers is not shared from the Front Desk menu and is therefore not itemized in this manual.

4. HIFIS Policies & Procedures

4.1. Client Consent Expiry

Client consent automatically expires after 365 days (1 year), unless the client indicates that they would like to withdraw their consent. Clients my withdraw their consent at any time by signing the Withdrawal of Consent form.

4.2. Timeliness of Data Entry

4.2.1. Required Data

On a nightly basis, shelter providers are required to input the following information into HIFIS:

- enter a new client's basic intake information (i.e., information required to add a client to HIFIS for the first time);
- upload the signed HIFIS & By-Name List Consent Form to the client's record;
- book the client into a bed;
- book the client out of a bed (if the client is being discharged).

Entering this information into HIFIS in real time, or as soon after intake or discharge as possible, ensures that:

- accurate shelter bed occupancy information is available to HIPSK agencies so they can make appropriate referrals;
- clients are booked out soon after discharge so that they can be booked in at another shelter;
- intake is not duplicated if the client tries to access another service;
- staff will not accidentally assign more than one client to the same bed.

4.2.2. Supplemental Data

On a daily basis, all providers will strive to enter supplemental information into HIFIS (i.e., information not required to add a client to HIFIS for the first time). If the agency is unable to enter this information daily, they will do so within five days of collecting this information from the client.

4.3. Password Requirements

4.3.1. Password Policy

HIFIS Account passwords must be a minimum of 12 characters and contain at least on of the following:

- one uppercase letter
- one lowercase letter
- one number
- one special characters

4.3.2. Password Expiry

Passwords will expire and must be reset every six months.

4.3.3. Password Attempts

If a user attempts to log in unsuccessfully 5 times their account will be locked. Locked accounts must be unlocked by a Super User or the HIFIS Coordinators.

4.3.4. Password Recovery

Users with designated work addresses can reset their passwords from the login page if they forget their password. Staff without designated work email addresses will NOT be able to self-reset because their email accounts are not considered secure. Instead, such users will be required to request a reset by the Super User for their agency or site. The Super User will reset the user credentials and provide the user with a temporary password. The user will then be able to access their HIFIS account and reset their password from within HIFIS.

Note: It is strongly recommended that all agencies assign work emails to staff who use HIFIS, and that Multi-Factor authentical (MFA) is enabled to help better secure email accounts and, by extension, HIFIS.

4.4. New User Registration

This procedure defines the steps required to activate a new staff member in HIFIS.

1. The Super User is responsible for submitting a HIFIS New User Registration Form (available from the HIFIS Support Centre at hipsk.ca/hifis) to the HIFIS Coordinators at hifis@shipyxe.ca

2. The HIFIS Coordinators will create a Moodle account. The user will receive an email with instructions for accessing their Moodle account.

3. Upon completion of the Moodle account, the new staff member will be required to submit a signed User and Confidentiality Agreement form at the end of the Moodle course.

4. The HIFIS Coordinators will activate the new staff member's user account and cc the Super User on the email.

5. The new staff member will receive a HIFIS account setup email. To access HIFIS for the first time, the new staff member will be required to open the link, set up their password, and agree to the HIFIS End-User License Agreement.

HIPSK

HIFIS New User Registration Form

User First Name:	
User Last Name:	
User Email Address:	
Agency:	
Primary Service Provider:	Choose an item.
Secondary Service Provider: (if applicable)	Choose an item.
Secondary Service Provider (if applicable)	Choose an item.
Secondary Service Provider (if applicable)	Choose an item.
HIFIS Role:	Choose an item.
Name of Supervising Staff Requesting Account on behalf of staff:	

Agency Authorization

I authorize that the above named staff has a reasonable and valid reason to require access to HIFIS.*	Choose an item.
Super Use Signature:	
Date Signed:	

*Forms must be submitted by email to hifis@shipyxe.ca by the agency's Super User.

Next Steps

Upon receipt of the form, the HIFIS Team will creation a Moodle account and a HIFIS account for the new staff as identified above.

If a work email is listed above, the user will be emailed their Moodle account and HIFIS account setup information. The HIFIS account will remain Inactive (i.e., the staff will not be able to log in to their account) until the staff has completed training. The Super User and Manager recorded on this form will be notified when the

If a work email is not listed above, the Super User will be sent the Moodle account information to provide to the staff. Upon completion of the staff's training, the Super User will also be responsible for resetting the staff's password and providing the staff member with their account information in person.

Note: If a staff member already has a HIPSK HIFIS user account because they work at another HIPSK agency or are joining your agency from another agency, please submit a New User Registration Form for that staff member so that the HIFIS Coordinators have the authorization on file for your agency. The new staff member may be required to repeat the Moodle course depending on whether their job role has changed and/or their period of inactivity in HIFIS.

5. Administration of HIFIS

HIPSK uses a centralized administrative model. Central administrative functions are the responsibility of the HIFIS Coordinators. Super Users are primarily responsible for making requests for changes in HIFIS. Super Users and select Managers (*) also have a small number of Administrative rights.

Function	Super User	HIFIS Help Desk
Incoming & Outgoing Users		
Request training and HIFIS account creation	✓	
Set up training and HIFIS account for new staff		✓
Activate user account upon completion of training		✓
Request deactivation of user account for outgoing staff	✓	
Deactivate user account for outgoing staff		✓
Access & Rights		
Request changes to user account	✓	
Revise user rights templates		✓
Make changes to user accounts (change the default SP, reassign rights template, grant access to an additional SP, etc.)		✓
Reset passwords for users who do not have designated work emails	✓*	
Unlock locked accounts when staff enter password incorrectly five times.	✓*	
Training		
Deliver user training		✓
Support new hires on basic data entry and request additional user training from HIFIS Coordinators as needed	✓*	
Provide ongoing technical support to staff		✓
Change options in a drop-down menu		✓
Service Providers		
Make a field mandatory		✓
Disable a field		✓
Add a bed or room to a shelter	✓*	✓

Make a room inactive or put a bed out of service	✓*	
Add a place to the Directory of Services, or modify an existing place		✓
Create a new custom table, or modify an existing table		✓
Add a new program, or manage an existing program		✓
Add a new SP, or manage an existing one		✓
Health-Checks		
Identify duplicate clients	✓*	✓
Deal with duplicate clients (merge or otherwise remove duplicate)		✓
Conduct weekly user audits to ensure staff are accessing information appropriately	✓*	
Conduct regular information and user audits	✓	✓
Edit/delete sensitive data added in error, added incorrectly, or added in two places (case notes, incident reports, etc.)	✓	✓
Other		
Write new reports		✓
Request new reports as required to support operations and reporting needs	✓	
Communicate in a timely fashion with the HIFIS Coordinators on behalf of the Service Provider and their HIFIS needs	✓	