HIFIS

Homeless Individuals and Families Information System

City of Hamilton User Manual

Last Updated: November 24, 2025

This document was drafted by the Housing Services Division and will be updated as business practices, operational needs, reporting expectations, and HIFIS evolves. As such, information shown may change. Revised versions of this manual will be provided to the community as they become available.

Please direct any questions to: HIFIS@hamilton.ca

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1.0 Introduction

Welcome to HIFIS

The **Homeless Individuals and Families Information System** (HIFIS) is a Homelessness Management Information System (HMIS) that supports the day-to-day operational activities of local agencies in the homeless-serving sector. It enables multiple service providers to access, collect, and share information to support those experiencing or approaching homelessness to help them find and maintain appropriate housing and supports.

Quick Facts about HIFIS 4.0

- HIFIS 4.0 is a comprehensive data collection and client case management system.
- HIFIS serves as the City of Hamilton's Homelessness Management Information System (HMIS) and main database. It is used to support Coordinated Access – an integrated process that helps streamline access to resources for people at risk of or experiencing homelessness.
- It was built by the Federal Government (Housing, Infrastructure and Communities Canada) and is used in communities throughout Ontario and Canada.
- HIFIS 4.0 launched in October 2019 in the City of Hamilton.
- HIFIS 4.0 is hosted on internal City of Hamilton Servers and all data shared and entered in HIFIS is protected through encryption.
- HIFIS is accessible from web-enabled devices such as laptops, smartphones, and tablets.
- For a full list of agencies using HIFIS in the City of Hamilton for one or more of their programs, see the *Service Providers in HIFIS List* Report available in HIFIS in Reports Manager.

Purpose of HIFIS 4.0

We use HIFIS in Hamilton to:

- Better serve individuals at risk of or experiencing homelessness and to support coordinated access work within our community.
- Facilitate information-sharing for service providers to work collaboratively to deliver services.
- Support operations, monitor trends, aid in decision-making, ensure accountabilities to funding mandates, and contribute to advancing the understanding of homelessness in Hamilton, Ontario, and Canada.
- Understand what is working and not working to prevent and reduce homelessness.

How to get the most out of this manual

This document is the primary guide to help new and existing HIFIS users enter information and navigate HIFIS successfully. It outlines HIFIS data entry expectations and requirements for the different types of service providers. Data entry requirements are informed by funder reporting needs, local priorities, and service provider operational needs.

All Service Providers and HIFIS Users need to understand the concepts and directions outlined in the following sections:

- **1.0 Introduction**
- **2.0 Key Concepts**
- **3.0 Hamilton's Priority Client Info Documentation**
- **4.0 Client Information Procedures**

Sections 5.0 Client Management Service Procedures provides guidance on how to use and enter data in each module that is currently in use in the City of Hamilton. At the start of each sub-section in Section 5.0, it states which programs/services are required to follow the guidance and procedures outlined for the module being discussed. **HIFIS Users should read about the modules and the procedures in Section 5.0 that are identified as required for their program and can skip the others.**

Section 6.0 includes guidance and procedures for completing modules that are optional to use in Hamilton.

2.0 Key Concepts

Data Sharing and Privacy in HIFIS

HIFIS is a centralized data collection and client case management system. Individuals and families at risk or experiencing homelessness (referred to as clients throughout this document) will have only one client record (i.e., client profile) in the system and all service providers working with the client can access this record.

A client profile has many different records within it that store different types of information (for example demographic information, shelter stay information, case supports, etc.). For some types of information found in the client profile, it may be shared and accessible across all service providers and to all users (e.g., demographic information), while other information may be limited to summary level data (e.g., case sessions and notes) for specific service providers and users.

Generally, information stored in the **Client Information** section of a client profile is accessible to all, while information stored in the **Client Management** section may be limited.

HIFIS 4.0 falls under the protection of the ***Municipal Freedom of Information and Protection of Privacy Act*** (MFIPPA). There are a number of agreements in place that help to protect information recorded and stored in HIFIS:

- All **Service Providers** sign *HIFIS Confidentiality Agreement for Service Providers* and *HIFIS Consent to Share Personal Information* and uphold the *HIFIS Data Sharing Protocol.*
- All **Users** sign Hamilton's *HIFIS Confidentiality and User Agreement* form and have their own personal secure login name and password.
- All **Clients** sign Hamilton's *Consent for the Collection and Sharing of Personal Information* form.

System Rights & Rights Templates

Users are assigned a set of system rights for each service provider they work at. Rights are assigned using a Rights Template.

A user's rights grant or restrict access to HIFIS modules and sub-modules. This allows us to simplify the interface for users – ensuring users only see what they need to for their role – and helps to sustain privacy best practices. Rights can also be set to specify if a user can create, delete, edit, or view records.

Audit Logs & Reports

All actions taken by users are recorded in a **System Audit Log** and are monitored as part of ongoing quality assurance initiatives completed by the City of Hamilton. Additionally, there is a **Client Activity Log** available directly on the client profile page that displays all activities within the client file, including details of when a record is viewed, created, modified, etc.

Attestations

HIFIS will prompt users to provide attestation the first time they go into a client's record if the client record was created by another service provider. You will only have to attest once. By providing attestation, you are declaring that you have a valid reason for accessing the client's record.

Examples of valid reasons for accessing records in HIFIS include[1]:

- Searching for a client who you are booking in for the night.
- Viewing the file of an outreach client who you are serving to see what services they have received in the past.
- At a request from a service provider staff who has signed on as part of coordinated access

Examples of when it is not acceptable to access records in HIFIS include:

- Searching for a client who you have lost touch with.
- Looking for a relative, friend, or colleague.
- Looking for someone who you have heard about in the news.
- At a friend's request or service provider not within coordinated access (e.g., "Can you take a look to see what's going on with this person and if they are accessing services anywhere?").

Why is this not appropriate?

- This access is not for the purpose of performing your job duties.
- Your friend or service provider not part of coordinated access needs to go through formal channels to gain access to their file.

Data Entry Completion Timeframes

For HIFIS to support day-to-day operations, facilitate information sharing and collaboration among service providers, and effectively monitor trends, aid decision-making, and ensure accountability to funding mandates, real-time, high-quality data is required. This requirement is in alignment with the Government of Canada's Reaching Home Coordinated Access Guidelines.

[1] BC Housing Homeless Individuals and Families Information System 4.0 (HIFIS) User Manual, November 2021

Client profile information and service interactions should be added and updated in HIFIS as close to real-time as possible. Where real-time data entry is not possible, staff have a maximum of five days from the day the information was collected, and the interaction took place, to enter the information into HIFIS.

Field Level Data Entry Requirements

This guide provides guidance on data entry for fields throughout HIFIS. Fields required have been assigned a priority level of Level 1, 2, or 3. Additionally, some fields have been identified as optional or not to be used.

Level 1 – Required to save the page in HIFIS. The required fields will have a star ★ by them.

Level 2 – Required for operational or reporting purposes. Includes information that may not be available when the record is created but is required as soon as possible.

Level 3 – Required in certain situations and service settings. For example, identifying what someone's role is in a family is only required if the client is being added to a family; otherwise, it is not required. Another example is adding an end date, which is only required when something like a service is ending; otherwise, it is not required.

Optional – Completed at the discretion of the service provider.

Do Not Use – Do not recommend using. Unfortunately, fields cannot be hidden.

Anonymous Service Interactions

Recording service interactions with individuals accessing the homelessness system who have not consented to be on HIFIS (i.e., refused to be on HIFIS or have not completed an intake yet) is **limited to the Group Activities, Goods and Services, and Turn Aways Modules.** For Group Activities and Turn Aways, there are Anonymous Client functions available. For Goods and Services, users can use the existing ***Anonymous, Anonymous*** client profile (HIFIS Client ID: 1).

The HIFIS Client #1 Anonymous, Anonymous account is a central anonymous account available across all service providers and is the only anonymous account allowed in HIFIS. Regular audits allow us to identify other potential anonymous accounts created by staff as well as its usage in other modules that is not allowed.

Recording interactions with anonymous individuals using Client #1:

- Allows programs to record and report on total interactions overall, whether it is each day, week, month, etc. and the types of interactions that took place.
- Does not allow programs to record and report on the details of each interaction with unique individuals who are anonymous and have not consented to have their information stored in HIFIS in any identifiable way.

How to Access HIFIS

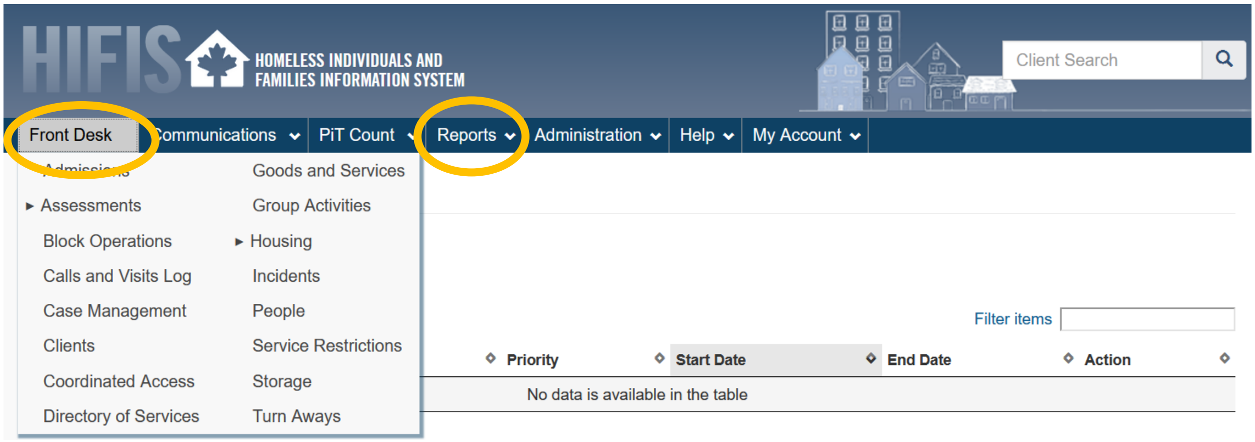
Once you have been set up as a authorized user in HIFIS and have received your login information from the City of Hamilton HIFIS Support Team (HIFIS@hamilton.ca), you can access HIFIS on a computer, mobile phone, or tablet using the following link: https://hifis.hamilton.ca/

- At the login screen, enter your username. Your username will be the first letter of your first name, followed by the first seven letters of your last name. Your username will be included in the Welcome email from HIFIS@Hamilton.ca.
- When you log in for the first time you don't have a password yet, please use the following link to set up your password: Forget Password (this information will also be included in your Welcome email).
- It is recommended that you use Firefox to access HIFIS. Other browsers may not display the interface properly.

Front Desk

When you log into HIFIS, you will see tabs along the top. The **Front Desk** and **Reports** tabs are the ones you will use the most.

- The **Front Desk** is the main menu for all service delivery in HIFIS. It is customized to each service provider and user rights template.
- The **Front Desk** allows staff to view services or create a service without searching for a client first and to see all records of that service for their program. As an example, if you go to the Front Desk and select **Admissions** in the dropdown, you will see a list of everyone booked in at your organization's shelter. You can also see Group Activities that took place. Alternatively, you can go directly to a client profile if you know the HIFIS Client ID or name of the individual you are looking for.
- **Reports** is where staff at different levels can run reports relevant to their program using a few simple parameters (e.g., start and end date, service provider, etc.). Report access is customized to meet the needs of users and will vary based on a user's user rights template.



HIFIS Support

For further guidance and information, please contact: HIFIS@hamilton.ca

Snapshot of a Client Profile

Every client in HIFIS has an electronic file that is made up of many different records. When you search for a client in HIFIS and enter their file, it will open the main page for that client which is the **Client – Details** page. Other records with information about the client including their contact information, shelter stays and other services they have accessed can be found in the **Client Information** and **Client Management** menus.

The **Client Information** menu contains information about the client that is shared and accessible by all service providers. In the City of Hamilton, it includes information for the categories listed below.

- Client Details
  - Vitals
  - Contact Info
  - Comments
  - Custom Tables – VI-SPDAT 3
- Consent
- Family
- Financial Profile
  - Incomes
- Housing History
- Identification
- Various Factors
  - Contributing Factors
  - Watch Concerns

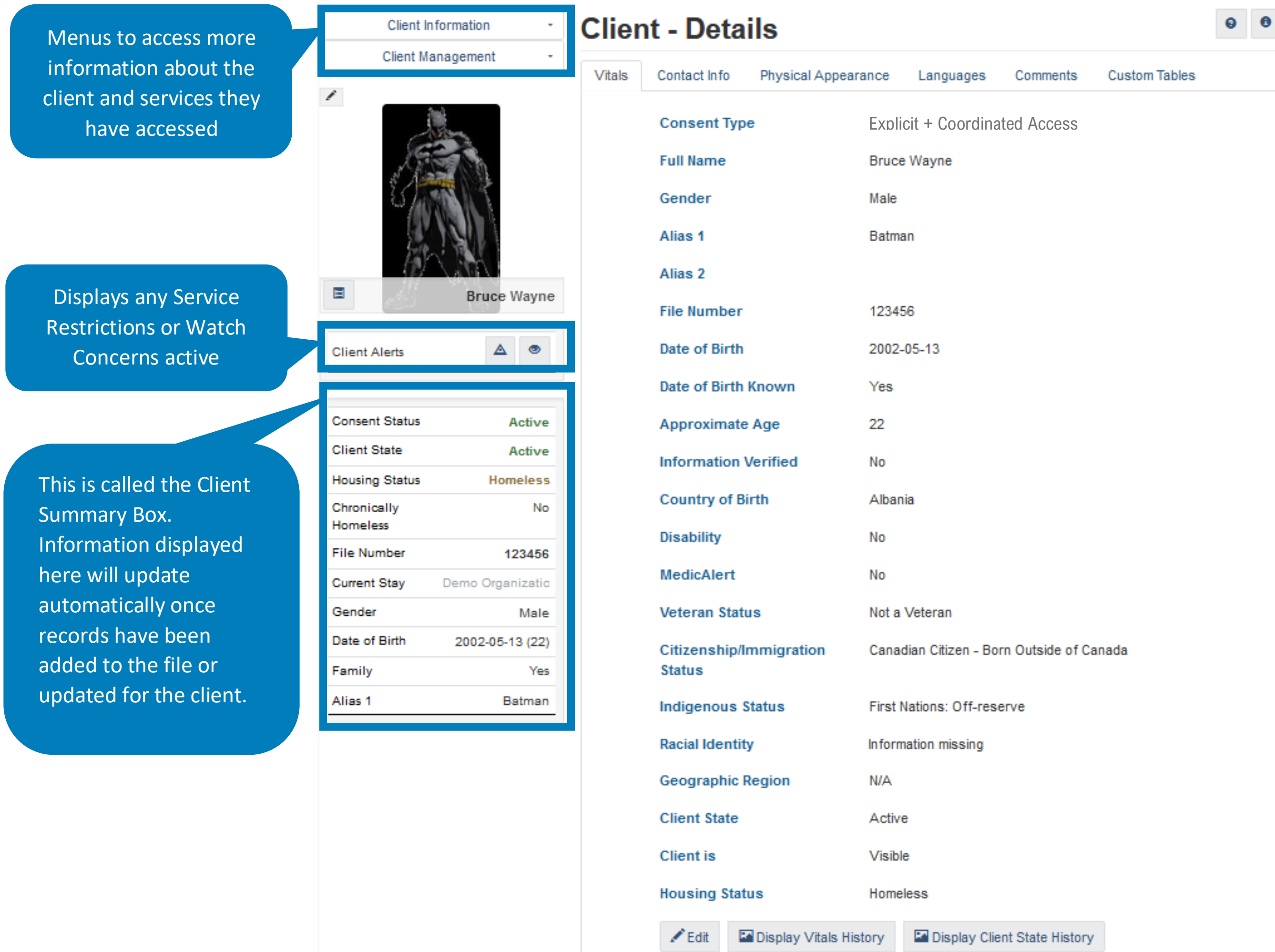
The **Client Management** menu contains information about activities and services the client has accessed or is related to a service they accessed. For example, Service Restrictions are listed under Client Management because it relates to a service. By design, the detailed records in this section of the client file are only viewable by staff at the service provider where the activity or service was performed. Staff who work with the client at other service providers can see basic summary information for the activity/service. Additional access to detailed records is in place currently, but is still limited to each sector (i.e., men, women, family, youth sectors)

In the City of Hamilton, the Client Management menu includes information for the activities and services listed below.

- Admissions
- Case Management
- Goods and Services
- Group Activities
- Housing Placements
- Incidents
- Service Restrictions
- SPDAT
  - VI-SPDAT (older versions)
  - SPDAT
- Storage
- Turn Aways

Main Page for a Client

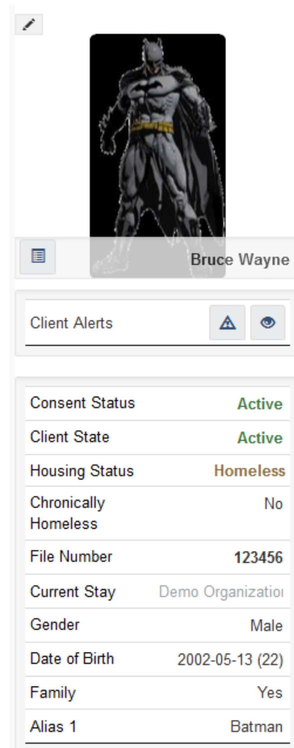
The following is an example of the main page of a client file in HIFIS. The **Client – Details** page is the main landing page for a client and on the left, you will see the **Client Information** and **Client Management** tabs, above what is called the **Client Summary Box**. More details about the client's main landing page are highlighted below.



Consent, Client State, and Housing Status

In the Client Summary Box, you will see three pieces of information that are important: Consent Status, Client State, and Housing Status. These are key components of a person's file in HIFIS and are used to generate high-quality, real-time lists and for service planning:

- **Consent** is required when creating a file for an individual in HIFIS. Without it, we cannot enter their information in HIFIS. Additionally, without Coordinated Access consent on file (or inherited coordinated access consent), we cannot include individuals in Coordinated Access activities (e.g., case conferencing).



- **Client State** (e.g., Active or Inactive) is our way of knowing who is currently receiving services or have engaged with Hamilton's Homelessness Serving System in the last 90 days.

  HIFIS automatically determines a Client State of "Active" or "Inactive" based on a number of 'transactions' or 'records' created in HIFIS within a period (e.g., new admission to a shelter, or new good, or new case session added). Active includes all individuals currently receiving services or have engaged with our homelessness system in the last 90 days. **Clients booked into Emergency Shelter will remain active throughout the duration of their stay.**

- **Housing Status & History** (e.g., Homeless, Housed) is our way of knowing an individual's current housing situation as well as when clients move from one housing type to another (e.g., unsheltered homelessness to long-term housing). Complete and accurate housing status and housing history information is essential for HIFIS to function as designed. Housing history records are an account of where a client has lived, including periods of homelessness when not accessing emergency shelter supports. Information derived from housing records (including shelter stays) inform policy development and planning.

  HIFIS automatically determines Housing Status based on shelter stay information or on the 'Housing Type' selected when creating a Housing History record. Housing Status cannot be manually updated in HIFIS and is system generated. At any point, an individual can have either a **Homeless, Transitional, Public Institutions, Housed, or Unknown** status.

3.0 Hamilton's Priority Client Info Documentation

When a new client record is being created in HIFIS, here are the things that should always be done as part of a common intake process. Information should be recorded in HIFIS within five days of the interaction with the client as per the HIFIS Data Sharing Protocol:

1. Create a Client Record with Consent and Basic Information completed.
2. Record Housing History
3. Record Contact Information
4. Record Financial Information
5. Record if the client has Identification
6. Record watch concerns, when applicable
7. Create a Family Unit, when applicable
8. Complete a VI-SPDAT in accordance with the Triage and Assessment Policy

These are core components of a client file that help to identify appropriate housing supports. They need to be completed accurately when adding a new individual to HIFIS and kept up to date as they access services in the homeless-serving system.

Tips for completing each of these steps and why it is important:

- **Consent:** Always select *Coordinated Access + Explicit* for individuals aged 16 and over and Inherited consent for dependants up to age 15 in families. Upload the signed copy!
- **Housing History:** If a client is new or returning to the homeless-serving system for supports after an extended period, ask where the client has been residing for the last 12 months or since they last accessed services, and create a housing history record with that information. If the client or family is not being booked into shelter, also add their current housing situation in the housing history module.
- **Contact Information:** Need to record contact information for a client and whether they do or do not have a way to get a hold of them when needed.
- **Financial Income:** Need to record whether a client does or does not have an income source.
- **Identification:** Need to record whether a client does or does not have ID.
- **Watch Concerns:** A Watch Concern is defined as a client-focused concern, need, or support that staff need to be aware of. They should be recorded as needed and should not be overused, used to make over-arching statements, or left open-ended.
- **Family Unit:** Families, couples, and others seeking housing services and supports together, should be linked by creating a Family Unit record for them. The family unit should have an adult identified as the family head and all accompanying family member relationships to the family head should be identified (e.g., partner, dependant, etc.).

If any of the information above is not available when setting up the client file, please collect the information and add it in accordance with the guidance outlined in this document as well as the HIFIS Data Sharing Protocol.

4.0 Client Information Procedures

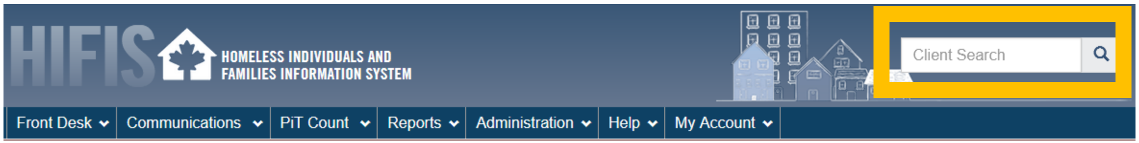
Procedures included in this section:	• How to search for a client • How to create a New Client (including consent) • How to add Housing History • How to add Contact Information • How to add Financial Information • How to create and manage families (when applicable) • How to add Identification • How to add Contributing Factors • How to add Watch Concerns
Prerequisite	• Client has signed the *Consent for the Collection and Sharing of Personal Information* form
Programs required to use the Client Information section:	All Programs

How to search for a client

Procedure:

To search for a client in HIFIS follow this procedure:

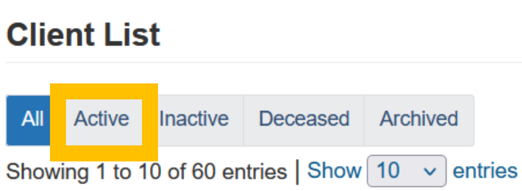
1. Go to the Client Search box located in the top right corner of the screen.
2. Enter the client's HIFIS ID number, name, or alias in the search box



Tips for searching for clients:

- Searches are not case-sensitive.
- **You must use at least three letters or numbers to search.**
- Less is more – you do not have to type the full name.
- Try multiple variations of a name. For example, Daniel could be under Dan, Danny, etc.
- Try just the last name or just the first name.
- Try nicknames, known aliases, or abbreviations (like M.J).
- A Client ID is a system-generated number that has leading zeros (i.e., 0000001234). When searching for a Client ID that is three numbers or less, add a "0" or "00" in front of the ID to improve the search.

When searching for a client in HIFIS, make sure you are in the "All" tab to search and review both Active and Inactive records at the same time.

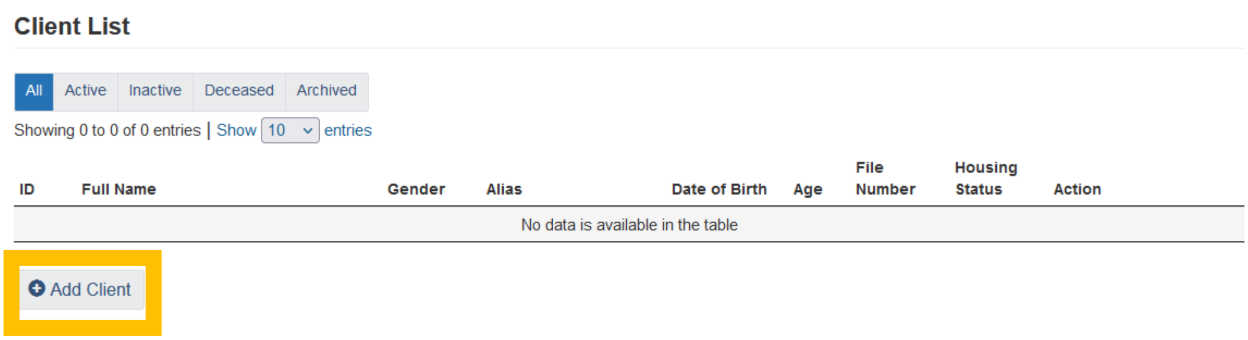


How to create a new client

Procedure:

To create a profile and a new client to HIFIS, follow this procedure:

1. Once you have searched for an individual and are confident they do not have an existing record in HIFIS, click the **Add Client** button to add them.



Before setting up a file for an individual in HIFIS, ensure that you or someone at your organization has reviewed and the client has signed the Consent for the Collection and Sharing of Personal Information form.

For locations serving families, set up the family head first, before setting up other family member's client profiles.

Data Entry Requirements:

When setting up a new client in HIFIS, the following are the data entry expectations and guidance for the **Add Client** page in HIFIS. Each field identified as having a data entry requirements level is required in all or some situations.

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Consent Type	Level 1 - Required	For adults and all youth aged 16 or older (including dependants aged 16 or over accessing services with a family), select the *Coordinated Access + Explicit* option if the individual has signed the common consent form. Dependants (children/youth 15 and

		under) of parents/guardians should have *Inherited* consent.
Consent Start Date	Level 1 - Required	Pre-populated and cannot be changed
Consent Expiry Date	Level 3 – Situationally Required	Complete only when a client has withdrawn consent to be in HIFIS. Use the calendar to search for the date to avoid data entry errors. Format: YYYY-MM-DD
Attachments	Level 2 - Required	Scan and save an electronic copy of the signed common consent form. The file type should be a PDF file. Only attach signed common consent forms to a client file. No other record types are allowed. Save the file using the following naming convention: first initial, full last name, "HIFIS Consent". For example, ***FFlintstone HIFIS Consent***. Not required if inherited consent is selected. For more information on consent, including storing the hard copy and electronic copies, please visit the Resources for Homeless-serving Partners page on the City of Hamilton website.
Client Name	Level 1 - Required	When creating a new client, will only appear if Inherited is selected as the consent type. Use the field's search function to select the family head (parent/guardian) for this individual. Recommend keeping your search criteria broad for this search.
Family Role	Level 1 - Required	When creating a new client, will only appear if Inherited is selected as the consent type. The options available will include all family role types but only the following are applicable to dependants aged 15 and under: • **Dependant – Child:** a person who is a dependant of a family head and is a child/youth aged 15 or under. • **Accompanying Child:** a person who is seeking services with a family head but is not a dependant and is a child/youth aged 15 or under. Can include extended family members

		who are children (for example, nieces, nephews, etc.).
Relationship to Family Head	Level 1 - Required	When creating a new client, will only appear if Inherited is selected as the consent type. The options available will include all family relationship types but only the following are applicable to dependants aged 15 and under: For dependants: • **Child:** the person is the child of the family head or partner aged 15 or under. • **Grandchild:** the person is the grandchild of the family head or partner. • **Relative - Child:** the person is a relative of the family head and is a child/youth aged 15 or under. • **Other:** the person has a relationship with the family head that is not listed.
Last Name	Level 1 - Required	Enter legal last name here.
First Name	Level 1 - Required	Enter legal first name here.
Middle Name	Optional	Enter legal middle name here
Alias 1	Optional	Enter preferred names, nicknames, or alias here.
Alias 2	Optional	Second option for adding an Alias. Information entered here is not searchable when trying to look up clients.
Date of Birth Known	Level 3 – Situationally Required	If you do not know the birthday of the client, use the toggle to select **No**. You will be asked to give an approximate age instead. Also required for clients who are dependants.
Date of Birth or Approximate Age	Level 1 - Required	Enter date of birth if known. Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD. Enter approximate age if date of birth is not known and indicated as such in question above. Also required for clients who are dependants.

Information Verified	Optional	If you saw a valid ID (see list of IDs included in the Identification module) and have confirmed the person's identity, select **Yes.**
Gender	Level 1 - Required	Select the appropriate value, as self-reported by the client, and recorded on the Common Intake Form. This is also required for clients who are dependants. • **Woman/girl:** Client self-identifies as being a woman/girl. • **Man/boy:** Client self-identifies as being a man/boy. • **Non-binary:** Client self-identifies as not being exclusively a man or a woman. • **Trans woman:** Client self-identifies as being a trans woman. • **Trans man:** Client self-identifies as being a trans man. • **Other (Not listed):** Client self-identifies as being something other than woman, man, or transgender. • **Prefer not to answer:** Client prefers not to answer or did not complete the question on the intake form. • **Not collected:** Information was not collected at Intake or while client was accessing supports.
Disability	Optional	Optional to identify if a client has a disability that requires additional assistance in case of emergencies
MedicAlert	Do not use	Do not use
Veteran Status	Level 1 - Required	Select the appropriate value, as self-reported by the client, and recorded on the Common Intake Form • **Veteran – Canadian Armed Forces:** Client self-identifies as a veteran of the Canadian Armed Forces. • **Not a Veteran:** Client does not self-identify as a veteran. • **Unknown – Not Asked:** Information was not collected at Intake or while client was accessing supports. • **Veteran – Allies:** Client self-identifies as a veteran in the armed forces of an allied country before coming to Canada.

		• **Veteran – Civilian:** Client self-identifies as previously a veteran but no longer on active duty. • **Former RCMP:** Client self-identifies as formerly a member of the Royal Canadian Mounted Police. • **Undeclared / Refused:** Client prefers not to answer or did not complete the question on the intake form.
Citizenship/ Immigration Status	Level 1 - Required	Select the appropriate value, as self-reported by the client, and recorded on the Common Intake Form. **Staff are required to verify documentation before selecting a Citizenship/ Immigration status and to update this field if a client's status in Canada changes.** Also required for clients who are dependants. • **Asylum Seeker:** Client has arrived in Canada and seeks the protection of Canada. They are currently in the process of completing their documentation to receive an Acknowledgement of Claim Document (AOC) or a Refugee Protection Claimant Document (RPCD) from Immigration, Refugees, and Citizenship Canada (IRCC). • **Canadian Citizen - Born in Canada:** Client was born in Canada and has Canadian citizenship. • **Canadian Citizen - Born Outside of Canada:** Client was not born in Canada and has Canadian citizenship. • **Permanent Resident/Immigrant:** Client is a landed immigrant or an immigrant who has settled permanently in Canada. They are a permanent resident but have not acquired Canadian citizenship. • **Refugee:** Client has arrived in Canada and seeks the protection of Canada. A refugee has received final determination that they are a Protected Person and is eligible to

		apply for permanent residency in Canada. • **Refugee Claimant:** Client has arrived in Canada and seeks the protection of Canada. They have received either an Acknowledgement of Claim Document (AOC) or a Refugee Protection Claimant Document (RPCD) from Immigration, Refugees, and Citizenship Canada (IRCC). • **Student Visa:** Client is an international student studying at a Canadian educational institution. • **Visitor Visa:** Client has a visitor's visa issued to people coming to Canada for a limited time and for specific reasons. • **Work Visa:** Client has a temporary resident permit which authorizes foreign nationals to enter and work in Canada on a temporary basis. A work permit is usually valid only for a specified job, employer, and time period. • **Prefer not to answer:** Client prefers not to answer or did not complete the question on the intake form. • **Not collected:** Information was not collected at Intake or while client was accessing supports.
Indigenous Status	Level 1 - Required	Select the appropriate value, as self-reported by the client, and recorded on the Common Intake Form. Also required for clients who are dependants. • **Non-Indigenous:** Client does not identify as Indigenous. • **First Nations: Off-reserve:** Client self-identifies as First Nations and lives off-reserve. • **First Nations: On-reserve:** Client self-identifies as First Nations and lives on-reserve. • **Inuit:** Refers to Indigenous people from Northern Canada who live in Nunavut, the Northwest Territories,

		Northern Quebec, and Northern Labrador. • **Métis:** People of mixed First Nation and European ancestry who identify themselves as Métis, as distinct from First Nations people, Inuit, or non-Aboriginal people. • **Non-status:** Client self-identifies as Indigenous to Canada and are not registered under the Indian Act. • **Prefer not to answer:** Client prefers not to answer or did not complete the question on the intake form. • **Not collected:** Information was not collected at Intake or while client was accessing supports.
Do you identify with any of the racial identities listed below? **Racial Identity**	Level 1 - Required	Select the appropriate value, as self-reported by the client, and recorded on the Common Intake Form. Also required for clients who are dependants. • **Yes:** Client self identifies with one or multiple racial identities that are listed in question two. • **Decline to answer:** Client prefers not to answer or did not complete the question on the intake form. • **Don't know:** Information was not collected at Intake or while client was accessing supports. • **Identify as Indigenous only:** Client only self-identifies as First Nations: Off-reserve, First Nations: On-reserve, Inuit, Métis, or Non-Status and does not self-identify with any of the listed options in question two for racial identity.
Select all that apply	Level 3 – Situationally Required	If you selected "Yes" in the previous question, then select the appropriate value, as self-reported by the client, and recorded on the Common Intake Form. Also required for clients who are dependants. • **Arab** (e.g., Syrian, Egyptian, Yemeni)

		• **Asian – South-east** (e.g., Filipino, Vietnamese, Cambodian, Malaysian, Laotian) • **Asian – East** (e.g., Chinese, Korean, Japanese) • **Asian – South or Indo-Caribbean** (e.g., Indian, Pakistani, Sri Lankan, Indo Guyanese, Indo-Trinidadian) • **Asian – West** (e.g., Iranian, Afghan) • **Black – African** (e.g., Ghanaian, Ethiopian, Nigerian) • **Black – Afro-Caribbean or Afro-latinx** (e.g., Jamaican, Haitian, Afro-Brazilian) • **Black – Canadian/American** • **Latin American** (e.g., Brazilian, Mexican, Chilean, Cuban) • **White** • **Not listed**
Country of Birth	Optional	Optional to enter someone's country of birth
Province/Territory of Birth (Canada)	Optional	Will only appear if Canada is selected as the Country of Birth. Optional to select the appropriate value from the options listed.
City of Birth (Canada)	Optional	Will only appear if Canada is selected as the Country of Birth. Optional to select the appropriate value from the options listed.
State (United States)	Optional	Will only appear if United States is selected as the Country of Birth. Optional to select the appropriate value from the options listed.
City (United States)	Optional	Will only appear if United States is selected as the Country of Birth. Optional to enter a city
Add Housing History	Level 2 - Required	Toggle to YES
Housing Type	Level 1 - Required	**Emergency Shelters, TLP, PSH: Select the housing type that represents the client's previous housing situation for the last 12 months.** If the client's housing varied, enter the most recent housing information first. After creating the record, add previous or additional housing information using Housing History as needed. See How to add Housing History in

		the next section for instructions. For locations serving families, previous housing information is minimally required for the family head. **HFSO, Drop-Ins, and other program types: Select the housing type that represents the client's current housing situation.** After creating the record, add previous or additional housing information for the last 12 months using Housing History as needed. See How to add Housing History in the next section for instructions. For locations serving families, current housing information is required for all family members. Select the appropriate value from the options listed. These housing types are considered as homeless. • **Couch Surfing:** Client was/is temporarily staying with friends and/or family. • **Emergency Shelter – Outside of Hamilton:** Client was staying in an Emergency Shelter located outside of Hamilton. • **Hotel / Motel:** Client was/is paying to stay in a hotel/motel/airbnb. For clients placed in a hotel/motel/Airbnb by a service provider, service providers should record their stay in the Admissions module. • **Unsheltered:** Client was/is unsheltered and/or regularly living in encampments throughout the City. • **Domestic Violence – Emergency Shelter:** Client was staying in a VAW/Domestic Violence Emergency Shelter. This housing type is considered as transitionally housed (e.g., provisionally housed). • **Transitional Housing:** Client was/is currently staying in a transitional housing program not in HIFIS (e.g., YMCA). Note – Do not enter a

		housing history to note that a client has moved into the YWCA-TLP or Wesley Youth Housing programs. These programs use the Admissions module in HIFIS, and the client will show as booked in there. These housing types are considered as a public institution. • **Corrections/Jail – Federal:** Client was recently discharged from a Correctional Service Canada institution (e.g., Beaver Creek, Collins Bay, Grand Valley, Joyceville, Millhaven, Warkworth, Bath). • **Corrections/Jail – Provincial:** Client was recently discharged from a Corrections Centres (e.g., Ontario Correctional Institute) and Detention Centres (e.g., Hamilton-Wentworth Detention Centre aka Barton St. Jail). • **Hospital – Medical:** Client was recently discharged from staying in a medical hospital. • **Hospital – Psychiatric:** Client was recently discharged from staying in a psychiatric hospital. • **Recovery/Treatment Facility:** Client was recently discharged from staying in a recovery/treatment facility. • **Withdrawal Management:** Client was recently discharged from a withdrawal management program. These housing types are considered as housed. • **Home Ownership:** Client is housed in a house/unit that they own. • **Housed in Family's House / Apartment:** Client is stably housed in a family's residence and not paying rent to a private/public landlord. Different from couch surfing. • **Lodging House:** Client is housed in a licensed lodging house. Typically, lodging houses offer private rooms without on-site access to kitchen facilities.

		• **Rental at Market Price:** Client is housed in a private market rental unit. • **Rental at Market Price with Rent Subsidy:** Client is housed in a private market rental unit and is in receipt of a monthly rent supplement benefit/payment. • **Residential Care Facility:** Client is currently residing in a Residential Care Facility offering communal living to people who require assistance with daily activities in life. This includes group homes. • **Single Room Occupancy:** Client is housed in a private market rental unit that is a shared dwelling with rooms leased individually. • **Social/Community Housing:** Client is housed in a social/community housing unit including rent-geared to income units. • **Supportive Housing:** Client is housed in an affordable permanent supportive housing unit offering coordinated wrap around services and supports to tenants.
Start Date	Level 1 - Required	Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD
End Date	Level 3 – Situationally Required	Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD **Emergency Shelters, TLP, PSH:** Enter the end date of the client's most recent housing situation. Ensure it does not overlap with or match the start date of their Emergency Shelter, TLP, or PSH stay. **HFSO, Drop-Ins, and other program types:** Leave blank as the housing information entered should represent the client's current housing situation.
Country	Level 1 - Required	Select the appropriate value from the options listed.

Once you have completed filling out the information, click the appropriate Save button to complete creating the client profile.

- **Save:** Saves the record and takes you to the Client Details page for the client

- **Save and go to Book In:** Saves the record and takes you to the Add Book In page. Should only be used by Emergency Shelters or city-funded TLP programs booking in clients.
- **Save and Start Family:** Saves the record and will automatically create a new family unit in HIFIS and assign the client as the family head. After using this button, it will take you to the Client – Family Screen. Should only be used when creating the client profile for the family head. It should not be used when setting up other family members as this would create duplicate family units.
- **Cancel:** Allows you to cancel the action and no client file will be created.

Single individuals do not need a family unit. By default, they are considered a single-person household in the City of Hamilton.

How to add Housing History

Importance of Housing History

For HIFIS to function as designed, it is crucial that complete and accurate housing history records exists for clients. **Housing history records are an account of where the client is currently living if they are not staying with an emergency shelter or city-funded TLP or PSH program, as well as where they have lived, including periods of homelessness when not accessing emergency shelter supports.**

Every new client created in HIFIS should have their housing situation for the last 12 months recorded when creating their profile.

At any time, clients should either have an active housing history record OR be booked in. They should never have both, nor should they have neither at the same time.

Procedure:

To add a housing history record for existing clients, follow this procedure:

1. Go the client's profile.
2. Go to Housing History by clicking on **Client Information → Housing History.**
3. Click the **Add Housing** button.
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

For locations serving families, it is a minimum requirement to collect and maintain housing history records for at least the family head.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Housing Type	Level 1 - Required	Housing types are used to categorize a client's previous or current housing status which can be Homeless, Transitional, Public Institution, or Housed. Select the appropriate value from the options listed.

		These housing types are considered as <u>homeless</u>: Use one of these options to record if a client <u>was</u> or <u>is</u> currently experiencing homelessness and is not currently staying in an Emergency Shelter/Hotel or a City-funded Transitional Living Program (TLP) or Permanent Supportive Housing Program (PSH). • **Couch Surfing:** Client was/is temporarily staying with friends and/or family. • **Emergency Shelter – Outside of Hamilton:** Client was staying in an Emergency Shelter located outside of Hamilton. • **Hotel / Motel:** Client was/is paying to stay in a hotel/motel/airbnb. For clients placed in a hotel/motel/Airbnb by a service provider, service providers should record their stay in the Admissions module. • **Unsheltered:** Client was/is unsheltered and/or regularly living in encampments throughout the City. • **Domestic Violence – Emergency Shelter:** Client was staying in a VAW/Domestic Violence Emergency Shelter. **This housing type is considered as <u>transitionally housed</u> (e.g., provisionally housed):** Use this option to record if a client <u>was</u> recently discharged from a Transitional Living Program not in HIFIS: • **Transitional Housing:** Client was/is currently staying in a transitional housing program including diversion programs that have beds available short

		term. Note – Do not enter a housing history to note that a client has moved into the YWCA-TLP, YMCA-TLP, or Wesley Youth Housing TLP programs. These programs use the Admissions module in HIFIS, and the client will show as booked in there. **These housing types are considered as a <u>public institution</u>:** Use one of these options to record if a client <u>was</u> recently discharged from an institution/facility in HIFIS. • **Corrections/Jail – Federal:** Client was recently discharged from a Correctional Service Canada institution (e.g., Beaver Creek, Collins Bay, Grand Valley, Joyceville, Millhaven, Warkworth, Bath). • **Corrections/Jail – Provincial:** Client was recently discharged from a Corrections Centres (e.g., Ontario Correctional Institute) and Detention Centres (e.g., Hamilton-Wentworth Detention Centre aka Barton St. Jail). • **Hospital – Medical:** Client was recently discharged from staying in a medical hospital. • **Hospital – Psychiatric:** Client was recently discharged from staying in a psychiatric hospital. • **Recovery/Treatment Facility:** Client was recently discharged from staying in a recovery/treatment facility. • **Withdrawal Management:** Client was recently discharged from a withdrawal management program. **These housing types are considered as <u>housed</u>:**

		Use one of these options to record if a client <u>is</u> currently housed. • **Home Ownership:** Client is housed in a house/unit that they own. • **Housed in Family's House / Apartment:** Client is stably housed in a family's residence and not paying rent to a private/public landlord. Different from couch surfing. • **Lodging House:** Client is housed in a licensed lodging house. Typically, lodging houses offer private rooms without on-site access to kitchen facilities. • **Rental at Market Price:** Client is housed in a private market rental unit. • **Rental at Market Price with Rent Subsidy:** Client is housed in a private market rental unit and is in receipt of a monthly rent supplement benefit/payment. • **Residential Care Facility:** Client is currently residing in a Residential Care Facility offering communal living to people who require assistance with daily activities in life. This includes group homes. • **Single Room Occupancy:** Client is housed in a private market rental unit that is a shared dwelling with rooms leased individually. • **Social/Community Housing:** Client is housed in a social/community housing unit including rent-geared to income units. • **Supportive Housing:** Client is housed in an affordable permanent supportive housing unit offering coordinated wrap

		around services and supports to tenants.
Start Date	Level 1 - Required	Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD
End Date	Level 3 – Situationally Required	Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD If the record is for the client's current housing situation, then leave the end date blank. If the record is for a previous housing situation, enter the date that the housing situation ended.
Place Name	Optional	Optional to enter the place/building name here, if applicable (e.g., Queens Place Residence)
Address Line 1	Level 3 – Situationally Required	Required if client is moving into housing. Enter the street address here (e.g., 123 Hamilton Avenue)
Address Line 2	Level 3 – Situationally Required	Required if client is moving into housing. Enter a second address line here, if applicable
Unit/Apartment Number	Level 3 – Situationally Required	Required if client is moving into housing. Enter unit/apartment number, if applicable (e.g., unit # 101)
Country	Level 1 - Required	Select the appropriate value from options listed. If a country other than Canada is selected, additional international fields will appear and be required.
Province/Territory	Level 1 - Required (Canada) Optional (Other Countries)	Canada: Select the appropriate value from the options listed. Can type "Ontario" Other Countries: Optional to enter a Province/Territory/State the client identified living in prior to living in Canada.

City	Level 1 - Required (Canada) Optional (Other Countries)	Canada: Select the appropriate value from the options listed. Can type "Hamilton" Other Countries: Optional to enter a City the client identified living in prior to living in Canada.
Postal Code	Level 3 – Situationally Required (Canada) Optional (Other Countries)	Canada: Required if client is moving into housing. Enter the postal code here. Other Countries: Optional to enter a City.
Geographic Region	Do not use	Do not use
Landlord	Do not use	Do not use
Rent	Optional	Optional to enter the total monthly rent amount here. If entering the rent amount, enter the full monthly rent required, not the rent geared to income amount the client may be paying.
Extension	Do not use	Do not use

How to add Contact Information

Having up-to-date contact information for clients will make it easier to contact them when supports or housing becomes available.

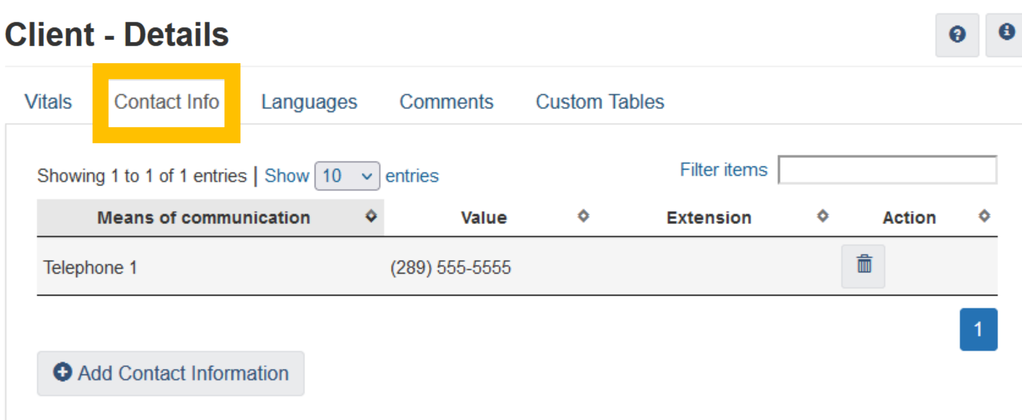
Staff are expected to enter information about whether a client does or does not have a way to reach them and to ensure this information is accurate and up to date.

Staff are responsible for deleting contact info added by other staff or service providers if the client reports that the information is out of date.

Procedure:

To add contact information for existing clients, follow this procedure:

1. Go to the client's profile page.
2. Go to the **Contact Info** tab by clicking on **Client Information → Client Details** and select the **Contact Info** Tab.



3. Click the **Add Contact Information** button.
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

For locations serving families, it is a minimum requirement to collect and maintain contact information records for at least the family head.

If a client has agreed to share a telephone or email address but has shared that they can only be reached in certain ways due to safety concerns (i.e., client has stated it is not safe to leave voice messages for a phone number provided), it is recommended that you do not enter that contact information in HIFIS.

Identifiable contact information for service providers (i.e., doctor, health professionals, Ontario Works Case Manager) should **not** be recorded in Contact Information.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Means of communication	Level 1 - Required	Select the appropriate value from the options listed: • **Email 1:** Client's primary/preferred email address they can be reached at. • **Email 2:** Client's alternative or secondary email they can be reached at • **Other:** Client does not have regular access to a telephone or email but has shared other means of communication in which they can be reached. For example, the client has their mail sent to a specific location, etc. If selecting this option, please provide more details in the Value field. If the client's primary contact email or telephone is a family member or friend, please enter the information using the telephone or email fields and not "Other". • **Telephone 1:** Client's primary/preferred phone number they can be reached on • **Telephone 2:** Client's alternative or secondary number they can be reached on • **No Contact Info Available:** Staff person has confirmed with the client that they currently have no means of communication available to them
Value	Level 1 - Required	Enter the client's phone number or email here. If "Other" is selected, enter more details here. If "No Contact Info Available" is selected, enter "No Contact Info Available" here as well.
Extension	Level 3 – Situationally Required	This field will only appear if the following means of communication are selected: Phone, Work Phone, Mobile Phone, Fax, Telephone 1, or Telephone 2 is selected

How to add Financial Information

Adding a client's income will make it easier to match them with supports available that could help them become housed or retain their housing.

- Staff are expected to enter information about whether a client does or does not have an income source and to ensure this information is accurate and up to date.
- Staff are responsible for updating records added by other staff or service providers if the client reports that the information is out of date.
- You can add multiple sources of income and the total will be calculated as Total Income.
- If the individual has shared their income source but not the amount, leave the wage field as $0.00.
- For locations serving families, it is a minimum requirement to collect and maintain income information records for at least the family head.

Procedure:

To add income information for existing clients, follow this procedure:

1. Go to the client's profile page.
2. Go to Financial Income by clicking on **Client Information → Financial Profile → Incomes Tab.**
3. Click the **Add Income** button.
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Income Type	Level 1 - Required	Select the appropriate value from the options listed. • **Canada Pension Plan (CPP):** Client is in receipt of a monthly income through the Federal Canada Pension Plan (CPP) program. • **Canada Pension Plan (CPP) Survivor Benefits:** Client is in

		receipt of a monthly income through the Federal Canada Pension Plan (CPP) survivor benefits program. • **Canada Pension Plan Disability Benefits:** Client is in receipt of a monthly payment through the Federal Canada Pension Plan (CPP) Disability Benefit. This benefit is available to individuals in receipt of CPP. • **Child Support:** Client is in receipt of child support payments. • **Child Tax Benefits:** Client is in receipt of a monthly payment through the Canada Child Benefit (CCB) program. Includes additional payments through the Ontario Child Benefit or Canada Child Disability Benefit, if applicable. • **Disability Benefits:** Client is in receipt of monthly payments through a program available for individuals or dependants living with a disability that is not listed or noted elsewhere in the list of options. • **Employment – Casual:** Client is employed on a casual basis. Casual employment is often occasional and not predictable. • **Employment – Full-time:** Client is employed on a full-time basis. • **Employment – Part-time:** Client is employed on a part-time basis. • **Employment Benefits / Insurance (EI):** Client is in receipt of a monthly income through the Federal Employment Insurance (EI) program. • **Guaranteed Income Supplement (GIS):** Client is in receipt of a monthly payment through the Federal Guarantee Income Supplement (GIS) program. This supplement is available to individuals in receipt of OAS. • **Long Term Disability (private):** Client is receiving a monthly

		income through a long-term disability insurance policy. • **Old Age Security:** Client is in receipt of a monthly income through the Federal Old Age Security (OAS) program. • **Ontario Disability Support Program (ODSP):** Client is in receipt of a monthly income through the ODSP program. • **Ontario Trillium Benefit (OTB):** Client is in receipt of a monthly payment through the Ontario Trillium Benefit. • **Ontario Works (OW):** Client is in receipt of a monthly income through the OW program. • **Other Income:** Client's income source(s) is not listed. • **Private Pension:** Client is in receipt of a monthly income through a private pension plan. • **Quebec Pension Plan (QPP):** Client is in receipt of a monthly income through the Quebec Pension Plan (QPP) program. • **Refugee Assistance Program:** Client is in receipt of a monthly payment through the Resettlement Assistance Program (RAP). • **Self-Employment:** Client is self-employed. • **Veteran Affairs Benefit/Pension:** Client is in receipt of any benefit or pension through Veteran Affairs Canada including, but not excluded: VAC Disability Award, VAW Disability Pension, VAC Financial Benefit, and War Veterans Allowance/Veterans Benefit • **Workers' Compensation Benefits:** Client is in receipt of a monthly payment from Workers' Compensation available through the Workplace Safety and Insurance Board (WSIB) • **No Income Available:** Staff person has confirmed with the

		client that they currently have no income source available to them
Pay Frequency	Level 1 - Required	Select the appropriate time interval that the client is paid: • Hourly • Daily • Weekly • Bi-Weekly • Monthly • Yearly Leave as “Hourly” if “No Income Available” is selected in the previous question.
Hours per month	Level 3 – Situationally Required	Will only appear if Hourly pay frequency is selected. Use the up and down arrow to enter the total hours per month. Leave as “0” if “No Income Available” is selected above.
Days per month	Level 3 – Situationally Required	Will only appear if Daily pay frequency is selected. Use the up and down arrow to enter the total days per month. Leave as “0” if “No Income Available” is selected above.
Wage	Level 1 - Required	Will adjust based on pay frequency selected (i.e., hourly wage, weekly wage, yearly wage, etc.) Enter the appropriate value. If unknown, leave as $0.00.
Start Date	Pre-populated	Leave as today’s date or enter the date the information was provided by the client.
End Date	Level 3 – Situationally Required	When adding a client’s current income source(s) leave empty. When identifying that a particular income source has ended, add an end date
Primary	Level 2 - Required	Toggle to YES if the income source is the client’s primary income source. Leave as no if it is not the client’s primary income source.

How to create and manage families

Families, couples, and other groups seeking housing services together should be recorded as a Family Unit in HIFIS. The purpose of a Family Unit in HIFIS is to connect individuals who access services as a group. Examples include:

- Households with children
- Married or common-law couples
- Unmarried couples
- Siblings or other kinship relationships (e.g., extended family members)
- Other types of interdependent relationships

A family unit record in HIFIS creates a link between individual client records. Individual involvement in a family unit can start and end at any time.

Single individuals do not need a family unit. By default, they are considered a single-person household in the City of Hamilton.

Procedure:

How to Create a Family Unit:

1. Go to a client's profile page. Note – The client you search for and start with here will automatically be assigned as the Family Head. This can be changed later but for simplicity, we recommend searching here for the Family Head.
2. Go to the Client – Family section by clicking on **Client Information → Family.**
3. Click the **Start New Family** button.

You also have the option to start a Family Unit when creating a new client who will be the Family Head. You can do this by using the **Save and Start Family** button when creating the profile for the client who will be the family head.

For the Family Head, leave the Relationship as N/A.

How to Add a Family Member to an existing Family Unit:

1. Go to a client profile for one of the existing family members.
2. Go to the Client – Family section of their profile by clicking on **Client Information → Family.**
3. Click the **Add Member** button. If the person you want to add to a Family does not have a profile in HIFIS yet, use the **Create and Add Member** button instead.
4. Fill in all required fields as per the data entry requirements below.

5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Family Member Name	Level 1 - Required	Search for the client that you want to add to the Family Unit.
Family Role	Level 1 - Required	Select the value that best describes the family member's role within the family unit: • **Family Head:** a person who has been identified as the lead for the family as a whole (e.g., the primary parent or guardian responsible for dependants) for the purposes of tracking services and reporting in HIFIS. Note – if selected for another family member when a family head already exists, the existing Family Head will be re-classified as a Partner. • **Partner:** a person who is an adult partner of a family head. • **Dependant Child:** a person who is a dependant of a family head and is a child/youth aged 15 or under. • **Dependant Adult/Youth:** a person who is a dependant of a family head and is an adult or youth aged 16 years or older. • **Accompanying Child:** a person who is seeking services with a family head but is not a dependant and is a child/youth aged 15 or under. Can include extended family members who are children (for example, nieces, nephews, etc.). • **Accompanying Adult/Youth:** a person who is seeking services with a family head but is not a dependant or partner of a family head and are an adult or youth aged 16 years or older (for

		example, extended family members, adult siblings, mother-in-law, etc.).
Relationship to Family Head	Level 1 - Required	Select the value that best describes the family member’s relationship to the family head: • **Child:** the person is the child of the family head or partner. • **Grandchild:** the person is the grandchild of the family head or partner. • **Relative – Child:** the person is a relative of the family head and is a child/youth aged 15 or under. • **Friend / Roommate:** The person is a friend / roommate of the family head. • **Partner:** The person is the adult partner of the family head. • **Relative – Adult / Youth:** The person is a relative of the family head and is an adult or youth aged 16 years or older. • **Other:** the person has a relationship with the family head that is not listed.
Start Date	Level 1 - Required	Leave as today’s date or if this is a new relationship, enter the date the individual started to access services with the family head.
End Date	Optional	When adding the client to the family unit leave empty. When identifying that the relationship with the family has ended, add an end date.

How to Join a Family Unit

1. Go to the client profile that you want to join to an existing family.
2. Go to the Client – Family section of their profile by clicking on **Client Information → Family.**
3. Click the **Join a Family** button.
4. This will take you to a Find Family page. Search for the Family Head using the Search field. Recommend keeping your search criteria broad for this search.
5. Once located in the list of results generated, click the arrow action button by their name 
6. This will take you to a Family Member Details page.

7. Fill in all required fields as per the data entry requirements below.
8. Click **Save** when you are done.

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Family Role	Level 1 - Required	Select the value that best describes the family member's role within the family unit: • **Family Head:** a person who has been identified as the lead for the family as a whole (e.g., the primary parent or guardian responsible for dependants) for the purposes of tracking services and reporting in HIFIS. Note – if selected for another family member when a family head already exists, the existing Family Head will be re-classified as a Partner. • **Partner:** a person who is an adult partner of a family head. • **Dependant Child:** a person who is a dependant of a family head and is a child/youth aged 15 or under. • **Dependant Adult/Youth:** a person who is a dependant of a family head and is an adult or youth aged 16 years or older. • **Accompanying Child:** a person who is seeking services with a family head but is not a dependant and is a child/youth aged 15 or under. Can include extended family members who are children (for example, nieces, nephews, etc.). • **Accompanying Adult/Youth:** a person who is seeking services with a family head but is not a dependant or partner of a family head and are an adult or youth aged 16 years or older (for example, extended family members, adult siblings, mother-in-law, etc.).

Relationship to Family Head	Level 1 - Required	Select the value that best describes the family member's relationship to the family head: • **Child:** the person is the child of the family head or partner. • **Grandchild:** the person is the grandchild of the family head or partner. • **Relative – Child:** the person is a relative of the family head and is a child/youth aged 15 or under. • **Friend / Roommate:** The person is a friend / roommate of the family head. • **Partner:** The person is the adult partner of the family head. • **Relative – Adult / Youth:** The person is a relative of the family head and is an adult or youth aged 16 years or older. • **Other:** the person has a relationship with the family head that is not listed.
Start Date	Level 1 - Required	Leave as today's date or if this is a new relationship, enter the date the individual started to access services with the family head.
End Date	Optional	When adding the client to the family unit leave empty. When identifying that the relationship with the family has ended, add an end date.

How to add Identification

Identification is a place to record identification information that is relevant to providing or matching an individual to services and supports and to determine if a client has any of the identification required for completing applications related to housing (i.e., income assistance, social housing, rental applications, etc.). **Emphasis is placed on recording someone's primary identification, which would include their legal name and date of birth, and any identification that has a photo.**

The Identification module is not intended to be used as a source of the details of a client's identification types for service providers to access and share. The details of a client's information such as their identification numbers, case or file numbers, or card numbers, etc. should only be shared and presented directly by the client when it is appropriate and only as needed. This ensures the client has consented to a service provider sharing those specific details.

Staff are expected to enter information about whether a client does or does not have ID and to ensure this information is accurate and up to date.

Do not upload attachments. Unfortunately, we cannot disable this field, but any documents uploaded through this module will be removed through routine quality assurance activities.

Do not record real identification numbers – enter "000". Unfortunately, we cannot disable this field, but the details of a client's information (identification numbers, case or file numbers, card, numbers, etc.) should not be stored in HIFIS. Any identification numbers recorded in HIFIS that appear valid will be removed through routine quality assurance activities.

Procedure:

To add identification information for a client, follow this procedure:

1. Go to the client's profile page.
2. Go to Identification by clicking on **Client Information → Identification.**
3. Click the **Add Identification** button.
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Identification Type	Level 1 - Required	Select the appropriate value from the options listed: • **Birth Certificate:** Client has a birth certificate available for use to facilitate housing supports and secure housing that has been verified by staff. • **Canadian Passport:** Client has a Canadian Passport available for use to facilitate housing supports and secure housing that has been verified by staff. • **International ID only:** Client only has identification issued by another country available. • **IRCC Permanent Resident Card:** Client has a Permanent Resident Card issued by Immigration, Refugees and Citizenship Canada available for use to facilitate housing supports and secure housing that has been verified by staff. • **IRCC Refugee Protection Claimant Document:** Client has a Refugee Protection Claimant Document issued by Immigration, Refugees and Citizenship Canada available for use to facilitate housing supports and secure housing that has been verified by staff. • **IRCC Study Permit:** Client has a study permit issued by Immigration, Refugees and Citizenship Canada available for use to facilitate housing supports and secure housing that has been verified by staff. • **IRCC Visitor Record:** Client has a visitor record (also known as a Visitor Visa or Temporary Resident Visa) issued by Immigration, Refugees and Citizenship Canada available for use to facilitate housing supports

		and secure housing that has been verified by staff. • **IRCC Work Permit:** Client has a work permit issued by Immigration, Refugees and Citizenship Canada available for use to facilitate housing supports and secure housing that has been verified by staff. • **No Government-issued ID Available:** Client does not have any government-issued identification available. • **Ontario Health Card:** Client has an Ontario Health Card available for use to facilitate housing supports and secure housing that has been verified by staff. • **Ontario Photo Card:** Client has an Ontario Photo Card available for use to facilitate housing supports and secure housing that has been verified by staff. • **Provincial Driver's Licence:** Client has a Provincial Driver's Licence available for use to facilitate housing supports and secure housing that has been verified by staff. • **Status Card:** Client has a Status Card available for use to facilitate housing supports and secure housing.
Identification Number	Level 1 - Required	Specific ID numbers are not required. Enter "000" as the ID number.
Attachments	Do not use	Do not use

How to add Contributing Factors

Contributing factors are a place to record factors which play a role in the client's life and may impact their ability to access services and to find, secure or maintain housing. It is also a place to record information that service providers need to know to provide appropriate services.

Procedure:

To add contributing factors information for a client, follow this procedure:

1. Go to the client's profile page.
2. Go to Contributing Factors by clicking on **Client Information → Various Factors** and select the **Contributing Factors** tab.
3. Click the **Add Contributing Factor** button.
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Contributing Factor	Level 1 - Required	**Please note that this list will be updated soon.** Select the appropriate value from the options available in the dropdown field.
Start Date	Level 1 - Required	Leave as today's date or adjust as needed. Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD
End Date	Level 3 – Situationally Required	Enter an end date for the contributing factor that is in alignment with the anticipated length of service for the client. Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD
Comments	Optional	Optional to add comments relevant to the contributing factor overall. Information entered should not be too personal in nature or considered health or safety information.

How to add Watch Concerns

Watch Concerns are an alert put on a client file in HIFIS when there is something significant staff need to know about the client. The intent is to flag staff to monitor the client for a particular thing.

A Watch Concern is defined as a client-focused concern, need, or support that staff need to be aware of. The list of watch concerns available in HIFIS and listed below have been identified as appropriate for use.

The following behaviour is not appropriate for watch concerns:

- Overusing them so that it loses its value.
- Be confused with incidents, service restrictions, or contributing factors. (For example, creating a watch concern because of a single incident/issue that occurred)
- They should not be open-ended or used to make over-arching statements about a person and their nature, particularly if it could inadvertently lead to the client being discriminated against in any way.

Procedure:

To add a watch concern for a client, follow this procedure:

1. Go to the client's profile page.
2. Go to Watch Concerns by clicking on **Client Information** → **Various Factors** and select the **Watch Concern** tab.
3. Click the **Add Watch Concern** button.
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Watch Concern	Level 1 - Required	Select the appropriate value from the options listed: • **Medical Alert** – Individual has an active medical condition that requires monitoring and/or assistance (example – medications, mobility needs). • **Prioritized – Housing or Housing Support** – Individual

		has been matched with a Housing or Housing Support program and the program has not been able to reach them to offer services or complete an intake. • **Safety Plan in Place** – Individual has an active safety plan in place that staff need to consult or be aware of. • **Safety Plan Concern** – Individual has an active safety plan in place and cannot be reached/located.
Start Date	Level 2 - Required	Leave as today's date or adjust as needed. Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD
End Date	Level 2 - Required	Enter an end date for the watch concern that is in alignment with the anticipated length of service for the client. "Prioritized – Housing or Housing Support" watch concerns should be assigned an end date of 30 days after the start date. Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD
Comments	Optional	Optional to add comments relevant to the watch concern overall that is not too personal or health-related information. Examples of acceptable uses are: • To add your contact information if you are a housing support staff trying to connect with a client to provide housing supports. • To note "Client needs support with taking medications" without going into specifics about the medication or the reasons for taking the medications. Examples of unacceptable uses are: • To record specific medication or health-related information for a client.

5.0 Client Management Service Procedures

The following section outlines the procedures and data entry guidance for modules in HIFIS that are used to track services in HIFIS, or items related to services such as turn aways and service restrictions.

Admissions (Stays)

Procedures included in this section:	• How to book in a client / family • How to book out a client / family • How to move a client / family to another bed or room
Programs required to use the Admissions module:	Emergency Shelters and Hotels, Transitional Living Programs

The Admissions module in HIFIS is used to record stays at city-funded emergency shelters, temporary overflow emergency shelters, hotel overflow programs, as well as transitional living programs.

How to book in a client / family

There are two ways to access the Admissions module to book in someone:

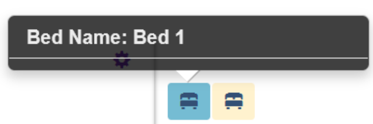
1) From the Front Desk
2) From the Client's Profile

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Admissions.**
2. On the Admissions page in the Booked In tab, select **Add Book In.** If the client selected is part of a Family, a **Book In Family** button will appear. For locations serving families, click the **Book In Family** button to add all family members.
3. Fill in all required fields as per the data entry requirements below.
4. Click **Next** when you are done to be taken to the **Book In - Bed Selection** page in HIFIS.

   The **Book In – Bed Selection** page is where you assign an individual or family members to specific beds and rooms. Each blue square represents a bed that is vacant. Each yellow square represents an overflow bed that is vacant. Hover over each bed square to see more details about it, such as bed number.

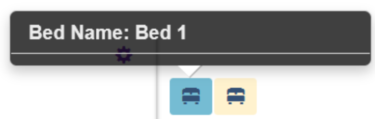
5. For locations serving single adults and youth: to assign the client to a bed, click on the appropriate bed. The bed icon will turn green once it is selected.

   For locations serving families: select a family member by clicking on their name. Once selected, the box with their name will turn orange. Then click on the appropriate bed/room that you want to book them into. The bed icon will turn green once it is selected. Complete this process for each family member.

6. Click **Save** when you are done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Admissions.**
3. Use the appropriate button to proceed with moving in a client or family:
   - For locations serving single adults/youth: select **Add Book In**
   - For locations serving families: select **Book In Family**
4. Fill in all required fields as per the data entry requirements below.
5. Click **Next** when you are done to be taken to the **Book In - Bed Selection** page in HIFIS.

   The **Book In – Bed Selection** page is where you assign an individual or family member to specific beds and rooms. Each blue square represents a bed that is vacant. Each yellow square represents an overflow bed that is vacant. Hover over each bed square to see more details about it, such as bed number.

6. For locations serving single adults and youth: to assign the client to a bed, click on the appropriate bed. The bed icon will turn green once it is selected.

   For locations serving families: select a family member by clicking on their name. Once selected, the box with their name will turn orange. Then click on the appropriate bed/room that you want to book them into. The bed icon will turn green once it is selected. Complete this process for each family member.

7. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name(s)	Level 1 - Required	Search for the client that is being booked in using the field search function. **For locations serving families and creating a Book In from the Front Desk:** search and select the family head or partner. Once selected, a Book In Family button will also appear. Click on this button to select all family members.
Start Date and Time	Level 1 - Required	Enter the book in date and time. Will auto-populate to current date and time but can be manually updated.
Expected Book Out Date	Optional	Optional to enter the expected book out date if known
Reason for Service	Level 1 - Required	Select the reason the client is seeking emergency shelter or a stay at a Transitional Living Program. The reason for service may differ for each stay the client has. Select the appropriate value from the options listed: • **Child Accompanying a Parent/Guardian:** The client is accessing services with family. • **Group Activity:** DO NOT USE FOR ADMISSIONS. • **Housing Loss – Conflict or Relationship breakdown:** Client had to leave housing because of a conflict or breakdown in a relationship with an individual(s) who resides there. This could be either friends or family members. • **Housing Loss – Eviction:** Client had to leave housing because they were provided with a Notice of Eviction under the Residential Tenancies Act • **Housing Loss – Financial:** Client had to leave housing because they could no longer afford to live there. • **Housing Loss – Personal Safety:** Client had to leave housing because of personal safety concerns.

		• **Housing Loss – Unsuitable Living Conditions:** Client had to leave housing because the status of the dwelling was poor and unsuitable to live in. For example, there was a fire, flood, no access to running water, unable to access unit due to mobility needs, etc. • **Housing Stability:** Client is currently housed and is accessing services as a housing loss prevention support. • **Information Not Collected:** For drop-ins and HFSO only. Used to identify that the client was not asked about the reason they were accessing supports. • **Newcomer – Asylum Claimant**: Client recently arrived in Canada, is seeking refugee protection, and does not have housing yet. • **Newcomer – Non-Asylum Claimant:** Client recently arrived in Canada, is not seeking refugee protection, and does not housing yet. • **Other:** Client requesting service for a reason not listed. • **Recently Discharged from Institution:** Client was recently discharged from an institution such as a hospital, corrections/jail, withdrawal management program, or recovery/treatment program. • **Unsheltered – Transient Lifestyle:** Client is unsheltered and requires sporadic access to service.
Program	Level 1 - Required	Should pre-populate to the appropriate program which is either Emergency Shelter Supports or Transitional Living Program (TLP).
Evacuation Assistance Required	Optional	Optional to use the toggle to identify if the client requires assistance during an emergency evacuation, fire alarm, etc.
Referred from	Level 1 – Required	It is required to note if the client was referred for admission to an emergency shelter / hotel location by another service provider or if it is a self-referral. Priority data entry is to note referrals from the

		Housing Focused Street Outreach team (HFSO) and domestic violence shelters in Hamilton. Options listed are grouped based on the place type or if it is a self-referral: **Client / Self:** client has self-selected to request admission to an emergency shelter / hotel location and was not referred by other service providers. **Another Shelter:** • **Emergency Homeless Shelter:** Client was referred from/to another city-funded Emergency Homeless Shelter program in the City of Hamilton • **Emergency VAW Shelter:** Client was referred from/to a VAW / Domestic Violence emergency shelter program. • **Overflow / Hotel:** Client was referred from/to the overflow / hotel emergency shelter program in the City of Hamilton **Health Services:** • **Health / Mental Health Services:** Client was referred from/to a public health or community-based mental health program (i.e., Hamilton Public Health mental health programs including Street Outreach and IntAC, CMHA, agency-based clinical programs, etc. • **Hospital:** Client was referred from/to a hospital or hospital-based program (i.e., St. Joseph’s Healthcare programs, Hamilton General Hospital programs, Juravinski programs, Hamilton Health Sciences, etc. **Housing Services:** • **City Housing:** Client was referred from/to CityHousing.

		• **Social Housing (City of Hamilton):** Client was referred from/to the Social Housing team. • **Supportive Housing Program:** Client was referred from/to a Permanent Supportive Housing Program. **Legal / Mediation Services:** • **Legal / Mediation Services:** Client was referred from/to a program that specializes in providing legal / mediation services and support. **Police Services:** • **Police Services:** Client was referred from staff in police services. **Settlement Services:** • **Newcomer Settlement Services:** Client was referred from/to a program that specializes in providing supports to newcomers. **Community Services:** • **Cultural Services:** Client was referred from/to a program that is faith, ethnicity, culturally based, etc. • **Public Library:** Client was referred from staff at a Hamilton Public Library branch. **Social Services – Community-Based:** • **Child & Youth Services:** Client was referred from/to a program that specializes in providing supports to children and youth. • **Educational Services:** Client was referred from/to a program that specializes in providing education services and supports. • **Employment Services:** Client was referred from/to a program that specializes in providing employment services and supports.

		• **Income Assistance:** Client was referred from/to OW, ODSP, tax clinic, etc. • **Recreational Services:** Client was referred from a staff at a Hamilton Recreation Centre or other Recreation program. **Indigenous Service Provider:** • **Indigenous Service Provider:** Select for all programming provided by Indigenous community partners (i.e., CHIL, HRIC) **Homelessness Services:** • **Diversion Program:** Client was referred from/to a Diversion program in the City of Hamilton • **Drop-In Program:** Client was referred from/to a Drop-In program in the City of Hamilton • **Early Intervention Supports Pilot:** Client was referred from/to an early intervention supports pilot program in the City of Hamilton • **Housing Focused Street Outreach:** Client was referred from/to the Housing Services Division Housing Focused Street Outreach team in the City of Hamilton • **ICM Program:** Client was referred from/to an Intensive Case Management (ICM) program in the City of Hamilton • **Prevention Program:** Client was referred from/to a Prevention program in the City of Hamilton • **RRH Program:** Client was referred from/to a Rapid Rehousing (RRH) program in the City of Hamilton • **TLP Program:** Client was referred from/to a Transitional Living (TLP) program in the City of Hamilton **Other:** • **Other:** Client was referred from a source not listed.

Intoxicated	Do not use	Do not use
Late Pass Time	Do not use	Do not use
Wake Up Time	Do not use	Do not use
Comments	Optional	Optional to add comments relevant to the client's overall stay or book out

How to book out a client / family

There are two ways to access the Admissions module to book out someone:

- From the Front Desk
- From the Client's Profile

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Admissions.**
2. In the **Admissions List** page, find the Client and click the **Book Out** button under the Action column for the client you want to book out 
3. Fill in all required fields as per the data entry requirements below.
4. Click **Book Out** when you are done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management** → **Admissions.**
3. In the **Client – Admission List** page, select the **Book Out** at the bottom of the page
4. Fill in all required fields as per the data entry requirements below.
5. Click **Book Out** when you are done.

Emergency Shelters should only create a housing history record for clients when booking them out if the following criteria is met:

- the client is moving into housing that is not part of a city-funded TLP or Permanent Supportive Housing program,
- The client is not currently being supported by RRH or ICM program.

Locations serving families will need to book out each family member individually.

Only clients who are leaving the Emergency Shelter or are believed to not be returning should be booked out. Clients who are being moved to another room or bed during their stay should be moved using the move procedures in the next section.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Service Provider	Level 1 - Required	Auto populated.
Room	Level 1 - Required	Auto populated.
Bed	Level 1 - Required	Auto populated
Reason for Service	Level 1 - Required	Auto populated
Book Out Date and Time	Level 1 - Required	Enter the book out date and time. Will auto-populate to current date and time but can be manually updated.
Reason for Discharge		Select the appropriate value from the options listed: Note: this field does not update or create housing history records. Please see the guidance on how and when to enter housing history records for more information. • **Admitted to Hospital – Medical:** Client has left shelter to be admitted to a medical hospital. • **Admitted to Hospital – Psychiatric:** Client has left shelter to be admitted to a psychiatric hospital. • **Aged Out of Program:** For youth sector only. Client has been asked to leave shelter and is being booked out because they are too old and no longer meet the age requirements for the shelter. • **Client Did Not Return:** Client has been booked out because they did not return. • **Corrections/Jail – Federal:** Client has been booked out

		because they are now in a Federal Correctional Facility. • **Corrections/Jail – Provincial:** Client has been booked out because they are now in a Provincial Correctional Facility • **Deceased:** Client has passed away. • **Disagreement with Rules - Involuntary Departure:** Client has been asked to leave shelter and is being booked out because of ongoing issues with not following rules. • **Housed:** Client has been booked out because they have moved into stable housing including permanent supportive housing (i.e., Dorothy Day Place). • **Moved in with Partner / Family / Friends / Relative:** Client has been booked out because they have moved in with family or friends. • **Prolonged Refusal to Engage:** Client has been asked to leave shelter and is being booked out because of ongoing issues with refusing to engage. • **Recovery Program:** Client has left shelter to participate in a recovery program that provides overnight or inpatient accommodations. • **Service Restricted:** Client has been asked to leave shelter and is being booked out because of a service restriction put in place. • **Transferred/Referred to Another Program:** Client has been booked out and is transferring to another city-funded emergency shelter/ short term stay/ TLP program. • **Treatment Program – Other:** Client has left shelter to participate in a treatment program that provides overnight accommodations. • **Treatment Program – Substance:** Client has left shelter

		to participate in a treatment program that provides overnight accommodations. • **Voluntary Departure:** Client has decided and informed shelter staff that they are leaving and have not reported going to any of the programs listed as reasons for discharge. • **Withdrawal Management:** Client has left shelter to participate in a withdrawal management program that provides overnight accommodations.
Referred to	Optional	Optional to add service or location client was referred to when discharged: **Another Shelter:** • **Emergency Homeless Shelter:** Client was referred from/to another city-funded Emergency Homeless Shelter program in the City of Hamilton. • **Emergency VAW Shelter:** Client was referred from/to a VAW / Domestic Violence emergency shelter program. • **Overflow / Hotel:** Client was referred from/to the overflow / hotel emergency shelter program in the City of Hamilton. **Health Services:** • **Health / Mental Health Services:** Client was referred from/to a public health or community-based mental health program (i.e., Hamilton Public Health mental health programs including Street Outreach and IntAC, CMHA, agency-based clinical programs, etc. • **Hospital:** Client was referred from/to a hospital or hospital-based program (i.e., St. Joseph's Healthcare programs, Hamilton General Hospital programs, Juravinski programs, Hamilton Health Sciences, etc.

		Housing Services: • **City Housing:** Client was referred from/to CityHousing. • **Social Housing (City of Hamilton):** Client was referred from/to the Social Housing team. • **Supportive Housing Program:** Client was referred from/to a Permanent Supportive Housing Program. **Legal / Mediation Services:** • **Legal / Mediation Services:** Client was referred from/to a program that specializes in providing legal / mediation services and support. **Police Services:** • **Police Services:** Client was referred from staff in police services. **Settlement Services:** • **Newcomer Settlement Services:** Client was referred from/to a program that specializes in providing supports to newcomers. **Community Services:** • **Cultural Services:** Client was referred from/to a program that is faith, ethnicity, culturally based, etc. • **Public Library:** Client was referred from staff at a Hamilton Public Library branch. **Social Services – Community-Based:** • **Child & Youth Services:** Client was referred from/to a program that specializes in providing supports to children and youth. • **Educational Services:** Client was referred from/to a program that specializes in providing education services and supports. • **Employment Services:** Client was referred from/to a program that specializes in providing

		employment services and supports. • **Income Assistance:** Client was referred from/to OW, ODSP, tax clinic, etc. • **Recreational Services:** Client was referred from a staff at a Hamilton Recreation Centre or other Recreation program. **Indigenous Service Provider:** • **Indigenous Service Provider:** Select for all programming provided by Indigenous community partners (i.e., CHIL, HRIC). **Homelessness Services:** • **Diversion Program:** Client was referred from/to a Diversion program in the City of Hamilton. • **Drop-In Program:** Client was referred from/to a Drop-In program in the City of Hamilton. • **Early Intervention Supports Pilot:** Client was referred from/to an early intervention supports pilot program in the City of Hamilton. • **Housing Focused Street Outreach:** Client was referred from/to the Housing Services Division Housing Focused Street Outreach team in the City of Hamilton. • **ICM Program:** Client was referred from/to an Intensive Case Management (ICM) program in the City of Hamilton. • **Prevention Program:** Client was referred from/to a Prevention program in the City of Hamilton. • **RRH Program:** Client was referred from/to a Rapid Rehousing (RRH) program in the City of Hamilton. • **TLP Program:** Client was referred from/to a Transitional Living (TLP) program in the City of Hamilton. **Other:**

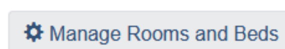
		• **Other:** Client was referred from a source not listed.
Comments	Optional	Optional to add comments relevant to the client's overall stay or book out

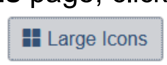
How to move a client / family to another bed or room

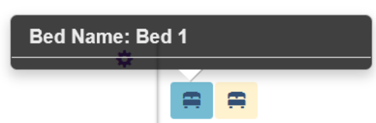
You can move individuals and family members to other beds and/or rooms at the same location through the Manage Rooms and Beds page in HIFIS that can be accessed through the Front Desk.

If a client is moving to another bed or room, Emergency Shelters should use the move procedures outlined in this section instead of booking the client in an out. This ensures that their stay information remains accurate, and they do not have artificial breaks in service. For example, if a client stays with a shelter for five nights, but moved beds after the first night, following this process will accurately show that they stayed for five nights as one record. However, if you booked them out when they moved beds, it would inaccurately show that they stayed for one night, and then came back and stayed for another four.

Procedure:

1. From the Front Desk menu, select **Admissions.**
2. Click the **Manage Rooms and Beds** button 

3. Once in the **Manage Rooms and Beds** page, click the **Large Icons** to see the client's name(s) and which bed(s) they are in 

4. This page is the same as the one used to assign beds and book in individuals. Each blue square represents a bed that is vacant. Each yellow square represents an overflow bed that is vacant. Hover over each bed square to see more details about it, such as bed number.


   Select the client that you want to move by clicking on their name. Once selected, the box with their name will turn orange. Then click on the appropriate bed/room that you want to move them to. A pop-up will appear asking if you are sure you want to move this client.

   For locations serving families: repeat step 4 for each family member.
5. Click **Save** when you are done.

Goods and Services

Procedures included in this section:	• How to add a Good • How to add a Service
Programs required to use the Goods and Services module:	Drop-In Programs, Housing Focused Street Outreach Programs also approved to use the module on an optional basis and are still required to follow the guidance and procedures outlined below are: Emergency Shelters, Transitional Living Programs, Rapid-Rehousing Programs, Intensive Case Management Programs, Permanent Supportive Housing Programs

The Goods and Services module in HIFIS is used to record brief, one-time service interactions with individuals as well as goods provided to them. These service interactions are often considered low-barrier services and can be recorded for known clients in HIFIS as well as unknown clients in our community (i.e., clients who are not in HIFIS).

When providing multiple goods and services to a client as part of the same service interaction, select the good or service type that was the primary or housing-related support provided / issue addressed during the interaction.

There are two ways to add a record in the Goods and Services module:

- From the Front Desk
- From the Client's Profile

How to add a Good

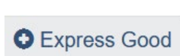
Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Goods and Services.**
2. Select **Express Good** 

3. Fill in all required fields as per the data entry requirements below.
4. Click **Save** when you are done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Goods and Services.**
3. Select **Express Good** 

4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name(s)	Level 1 - Required	Search for the client that received the good in the field search function. You can select multiple clients at once if the following is true: they received the same Good type, on the same date, and their reason for service is the same. If the client has not consented to have their information stored in HIFIS, search and select Client #1 (first name: Anonymous, last name: Anonymous)
Good	Level 1 - Required	Select the appropriate value from the options listed: • **Clothing:** the provision of clothing to an individual to support their wellbeing. • **Harm Reduction Supplies:** the provision of harm reduction supplies to an individual to support their wellbeing. • **Menstrual Supplies:** the provision of menstrual supplies to an individual to support their wellbeing. • **Monetary – Cash / Gift Card:** the provision of one-time petty cash / gift card to an individual. • **Monetary – Housing-related expenses:** the provision of one-time financial supports to help an individual with housing-related expenses. Examples include: Application fees, Energy Arrears, Moving Expenses, Rent Deposit, Rental Arrears, Utility Deposits, etc.

		• **Seasonal Supplies:** the provision of supplies for the winter or summer to an individual to support their wellbeing and to help them stay warm or cool. Examples include: warm blankets, sunscreen, mini-fans, etc. • **Snacks / Water:** the provision of snacks / water to an individual to support their wellbeing. • **Toiletries:** the provision of toiletries to an individual to support their wellbeing. • **Other Provisions to Support Basic Needs:** the provision of other goods not listed to an individual to support their wellbeing.
Program	Level 1 - Required	Select the appropriate program / service that the individual accessed. For single service programs, the program field will pre-populate to the appropriate value. For programs that use the Goods and Services module to record interactions for multiple services, select the appropriate value.
Unit of Measure	Level 1 - Required	Select “Each”
Unit Price	Level 3 – Situationally Required	Required if the good provided to a client has a monetary value. Examples include dollar amount of gift cards distributed or financial assistance provided, if applicable. Not required for other provisions and supplies provided such as toiletries, clothing, seasonable supplies, etc.
Reason for Service	Level 1 - Required	Select the reason the client is seeking service. The reason for service may differ for each visit or service the client has. Select the appropriate value from the options listed: • **Child Accompanying a Parent/Guardian:** The client is accessing services with family. • **Group Activity:** DO NOT USE FOR GOODS AND SERVICES. • **Housing Loss – Conflict or Relationship breakdown:** Client

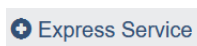
		had to leave housing because of a conflict or breakdown in a relationship with an individual(s) who resides there. This could be either friends or family members. • **Housing Loss – Eviction:** Client had to leave housing because they were provided with a Notice of Eviction under the Residential Tenancies Act • **Housing Loss – Financial:** Client had to leave housing because they could no longer afford to live there. • **Housing Loss – Personal Safety:** Client had to leave housing because of personal safety concerns. • **Housing Loss – Unsuitable Living Conditions:** Client had to leave housing because the status of the dwelling was poor and unsuitable to live in. For example, there was a fire, flood, no access to running water, unable to access unit due to mobility needs, etc. • **Housing Stability:** Client is currently housed and is accessing services as a housing loss prevention support. • **Information Not Collected:** For drop-ins and HFSO only. Used to identify that the client was not asked about the reason they were accessing supports. • **Newcomer – Asylum Claimant**: Client recently arrived in Canada, is seeking refugee protection, and does not have housing yet. • **Newcomer – Non-Asylum Claimant:** Client recently arrived in Canada, is not seeking refugee protection, and does not housing yet. • **Other:** Client requesting service for a reason not listed. • **Recently Discharged from Institution:** Client was recently discharged from an institution such as a hospital, corrections/jail,

		withdrawal management program, or recovery/treatment program. • **Unsheltered – Transient Lifestyle:** Client is unsheltered and requires sporadic access to service.
Comments	Optional	Optional to add comments relevant to the good provided or interaction overall
Geographic Region	Do not use	Do not use
Capture Service Location	Do not use	Do not use

How to add a Service

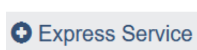
Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Goods and Services.**
2. Select **Express Service** 

3. Fill in all required fields as per the data entry requirements below.
4. Click **Save** when you are done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Goods and Services.**
3. Select **Express Service** 

4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name(s)	Level 1 - Required	Search for the client that received the service in the field search function.

		You can select multiple clients at once if the following is true: they received the same Service type, on the same date, and their reason for service is the same. If the client has not consented to have their information stored in HIFIS, search and select Client #1 (first name: Anonymous, last name: Anonymous).
Service	Level 1 - Required	Select the appropriate value from the options listed: • **Accompaniment to appointments:** Any interaction that is dedicated to accompanying an individual to appointments. • **Group Programming Participation:** Any interaction where individuals who are unsheltered, experiencing homelessness, or visiting a community-based drop-in centre attended group-based programming including: art, finance/budget, life skills group programming, etc. • **Pet-related supports and referrals:** Any interaction where a referral has been made to a service or support program that specializes in support for pets, including City of Hamilton Animal Services, and SPCA clinic referrals and requests for service. • **Prenatal / Parenting supports and referrals:** Any interaction where a referral has been made to a service or support program that specializes in support for expecting or new parents. • **Protocol awareness and education:** Any interaction with unsheltered individuals living in encampments regarding the Encampment Protocol, including general information, compliance concerns, potential compliant / locations, ‘good neighbour conversations,’ and requests for

		site maintenance and garbage cleanup. • **Rapport-building and engagement:** Any interaction with individuals who are unsheltered, experiencing homelessness, or visiting a community-based drop-in centre, including initial greetings and conversation, suggesting services to access, supportive check-ins, and wellness checks. • **Referral – Financial Aid & Income Supports:** Any interaction that supports an individual's access to income supports and financial aid programs or services, such as Ontario Works, ODSP, CPP, OAS, and EI, as well as income tax support. Examples include: Support with Ontario Works, Support with Ontario Disability Support Program, Support with submitting income tax forms, CPP/OAS, EI. • **Referral – Harm Reduction Supports:** Any interaction where a referral has been made to a service or support program that specializes in supporting harm reduction, including safe-injection sites, methadone clinics, Hamilton Public Health Van Needle Syringe program (i.e., the Van), Urban Core and AIDS Network. Note: the direct provision of harm reduction materials should be captured as a Good instead of a Service. • **Referral – Indigenous Specific Supports:** Any interaction where a referral has been made to an agency or program that is primarily for individuals who are Indigenous, including Hamilton Regional Indian Centre (HRIC – Ottawa and King), Aboriginal Health Centre, Native Women's Centre, and the De dwa da dehs nye>s mobile medical clinic.

		• **Referral – Mental Health-Related Supports:** Any interaction where a referral has been made to a service or support program that specializes in supporting mental health. Examples include: Good Shepherd Barrett Centre, St. Joe's psychiatric emergency program, schizophrenia programs, CMHA, and Hamilton Police Services MCERT or COAST programs. • **Referral – Physical Health-Related Supports:** Any interaction where a referral has been made to a service or support program that specializes in supporting physical health. Examples include: Hospital programs, De dwa da dehs nye>s mobile medical clinic, Good Shepherd Health on Wheels bus, Encampment Engagement Paramedics (EEP), Social Navigator Program (SNP), and calls to 911 / emergency services. • **Referral – Shower / Washroom program:** All referrals made to shower and washroom programs within the city, including Bennetto Community Centre, Norman Pinky Lewis Community Centre, and any other washrooms or showers made available through the city's program, as well as any other shower services available in the community. • **Support with completing ATH application:** Any interaction that is dedicated to helping an individual with their Access to Housing (ATH) application for social housing in Hamilton. • **Support with completing taxes:** Any interaction that is dedicated to helping an individual complete their taxes for the purposes of being eligible for housing support programs which could include: rental assistance, permanent

		supportive housing, or social housing. • **Support with liaising with health / community service providers:** Any interaction that is dedicated to liaising with health or community-based service providers with or on behalf of an individual. • **Support with liaising with housing support workers:** Any interaction that is dedicated to liaising with housing support workers from other organizations with or on behalf of an individual. • **Support with liaising with landlords:** Any interaction that is dedicated to liaising with potential or current landlords with or on behalf of an individual. • **Support with obtaining an I.D.:** Any interaction that is dedicated to helping an individual obtain an I.D which could include: Birth Certificate, Ontario Health Card, Ontario Photo Card, etc. • **Other Supports:** All other supports or referrals provided to individuals who are unsheltered, experiencing homelessness, or visiting a community-based drop-in centre that does not fit within any of the other categories including referrals to ID clinics, food programs, laundry services, legal supports, and advocacy for other supports.
Program	Level 1 - Required	Select the appropriate program / service that the individual accessed. For single service programs, the program field will pre-populate to the appropriate value. For programs that use the Goods and Services module to record interactions for multiple services, select the appropriate value.
Reason for Service	Level 1 - Required	Select the reason the client is seeking service. The reason for service may differ for each visit or service the client has. Select the appropriate value from the options listed:

		• **Child Accompanying a Parent/Guardian:** The client is accessing services with family. • **Group Activity:** DO NOT USE FOR GOODS AND SERVICES. • **Housing Loss – Conflict or Relationship breakdown:** Client had to leave housing because of a conflict or breakdown in a relationship with an individual(s) who resides there. This could be either friends or family members. • **Housing Loss – Eviction:** Client had to leave housing because they were provided with a Notice of Eviction under the Residential Tenancies Act • **Housing Loss – Financial:** Client had to leave housing because they could no longer afford to live there. • **Housing Loss – Personal Safety:** Client had to leave housing because of personal safety concerns. • **Housing Loss – Unsuitable Living Conditions:** Client had to leave housing because the status of the dwelling was poor and unsuitable to live in. For example, there was a fire, flood, no access to running water, unable to access unit due to mobility needs, etc. • **Housing Stability:** Client is currently housed and is accessing services as a housing loss prevention support. • **Information Not Collected:** For drop-ins and HFSO only. Used to identify that the client was not asked about the reason they were accessing supports. • **Newcomer – Asylum Claimant**: Client recently arrived in Canada, is seeking refugee protection, and does not have housing yet. • **Newcomer – Non-Asylum Claimant:** Client recently arrived in Canada, is not seeking refugee

		protection, and does not housing yet. • **Other:** Client requesting service for a reason not listed. • **Recently Discharged from Institution:** Client was recently discharged from an institution such as a hospital, corrections/jail, withdrawal management program, or recovery/treatment program. • **Unsheltered – Transient Lifestyle:** Client is unsheltered and requires sporadic access to service.
Hours	Optional	Optional to add the number of hours spent with a client during the interaction being recorded.
Minutes	Optional	Optional to add the number of minutes spent with a client during the interaction being recorded.
Referred To	Optional	Optional to add the location type in which the client was referred. The available options differ from the "Service" field but they do share some conceptual similarities. The "Service" field is the primary location to document when and where a referral has been made for the client.
Comments	Optional	Optional to add comments relevant to the good provided or interaction overall
Geographic Region	Do not use	Do not use

Group Activities

Procedures included in this section:	• How to create a Group Activity • How to add participants to a Group Activity • How to add organizers to a Group Activity • How to add participant demographics to a Group Activity • How to replicate a Group Activity
Programs required to use the Group Activity module:	Drop-In Programs, Permanent Supportive Housing Programs Programs also approved to use the module on an optional basis and are still required to follow the guidance and procedures outlined below are: Emergency Shelters

The Group Activities module in HIFIS is used to record who attends drop-in programs on a daily basis, high-volume usage of other services available at drop-in programs, and group/event activity attendance. These service interactions are often considered low-barrier and can be recorded for known clients in HIFIS as well as unknown clients in our community.

The primary uses of the Group Activities module are to record:

- Daily visitors to Drop-In programs.
- Usage of specific services and resources available at drop-ins if those services have been identified as having high usage.
- Resident participation in social connection group activities such as art, life skills, etc. at Permanent Supportive Housing programs.

How to create a Group Activity

Group Activities can be set up through the Front Desk menu.

Procedure:

1. From the Front Desk menu, select **Group Activities**
2. Click **Add Activity** Add Activity
3. Fill in all required fields as per the data entry requirements below.
4. Click **Save** when you are done.

Group Activities cannot be deleted. If a group activity is created in error, it is recommended that it is edited and repurposed for another group activity/event.

Services and goods accessed less often should be recorded as a Good or Service instead of a Group Activity.

For locations that opt to use Group Activities to track usage of services by Emergency Shelter stayers, please ensure these service interactions are tracked separately from drop-in activities and that the appropriate program is assigned to the group activity. A group activity should only be assigned one program at a time (i.e., Drop-Ins/Resource Centre or Emergency Shelter Supports).

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Group Activity	Level 1 - Required	Select the appropriate value from the options listed: • **Daily Total Visitors – Drop In Program:** Known and anonymous individuals who accessed a drop-in program on a given day/night. This includes visitors of warming spaces contractually funded by the City of Hamilton. If the program is open after midnight, the service date should be the date the program opened for the day. • **Daily Usage – Laundry Facilities:** Total individuals who accessed laundry facilities on a given day. Note – should always be a subset (i.e., lower) than total daily visitors. • **Daily Usage – Meal / Food Program:** Total individuals who accessed a meal or food program on a given day. Note – should always be a subset (i.e., lower) than total daily visitors. • **Daily Usage – On-site Community / Health Services:** Total individuals who accessed on-site services led by other service providers. Examples could include: health clinics, harm reduction supports, etc. Note – should always be a subset (i.e., lower) than total daily visitors.

		• **Daily Usage – Shower / Washroom Facilities:** Total individuals who accessed shower / washroom facilities on a given day. Note – should always be a subset (i.e., lower) than total daily visitors. • **Daily Usage – Sleeping Spaces:** Known and anonymous individuals who accessed a sleeping space (i.e., bed, mat) available on a first come, first serve on a given day/night. This does not include spaces that are contractually funded as emergency shelter beds or warming spaces. If the program is open after midnight, the service date should be the date the program opened for the day. Note – should always be a subset (i.e., lower) than total daily visitors. • **Daily Distribution – Bus Tickets:** Total individuals who received a bus ticket on a given day. • **Community/Group Art Event:** Total individuals who attended an art-related community and empowerment event. • **Community/Group Budget – Finance Event:** Total individuals who attended a budgeting/ finance related community and empowerment event. • **Community/Group Employment Event:** Total individuals who attended an employment related community and empowerment event such as events about how to search or apply for employment, skills training events, etc. • **Community/Group Housing Event:** Total individuals who attended a housing related community and empowerment event such as events about searching for housing, tenant rights, etc.

		• **Community/Group Life Skills Event**: Total individuals who attended a life skills (e.g., cooking, cleaning) related community and empowerment event. • **Community/Group Recreation Event:** Total individuals who attended a recreation or physical activity/ movement related community and empowerment event. • **Community/Group Social Event:** Total individuals who attended a social related community and empowerment event.
Program	Level 1 - Required	Select the appropriate program / service for the group activity. For single service programs, the program field will pre-populate to the appropriate value. For programs that offer multiple services, select the appropriate value.
Start Date and Time	Level 1 - Required	Enter the group activity date and time. Will auto-populate to current date and time but can be manually updated.
Description	Optional	Optional to add a description to the Group Activity with more details about the activity / event.
Reason for Service	Level 1 - Required	Select the following value from the options listed: • **Group Activity:** Used to identify that this is a group activity and reason for service is not applicable to the whole group.
Geographic Region	Do not use	Do not use
Capture Service Location	Do not use	Do not use

How to add participants to a Group Activity

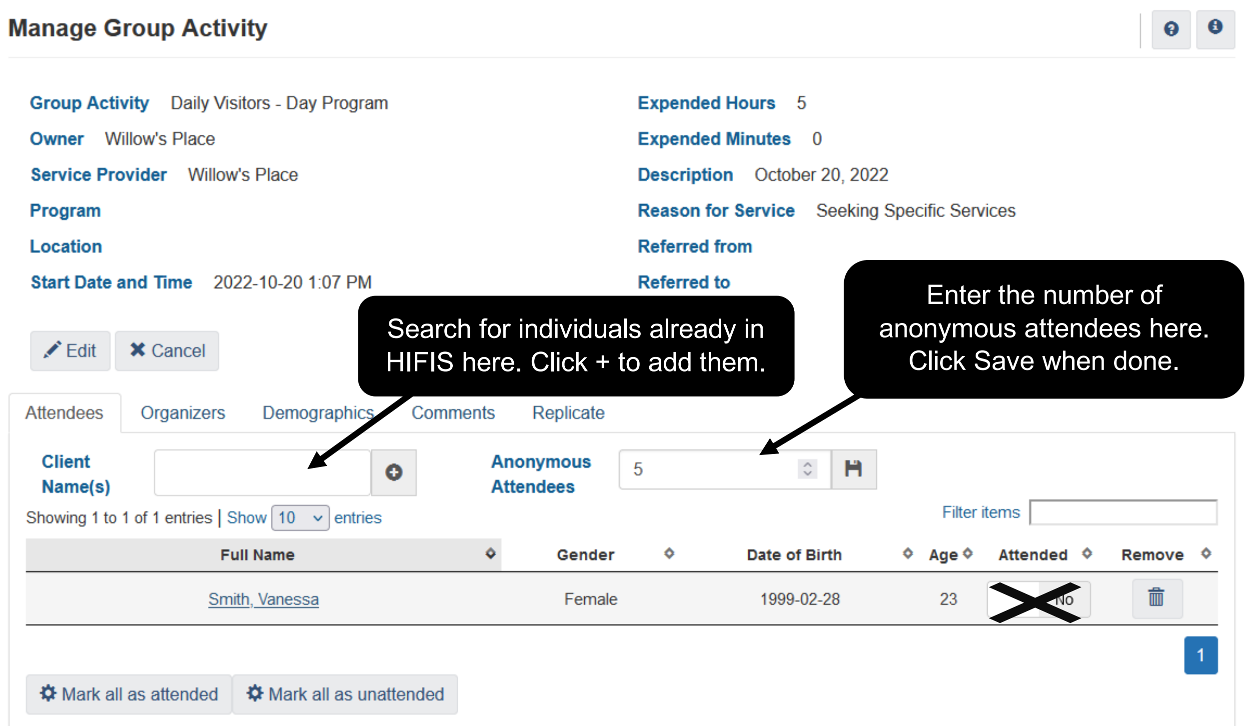
After you set up a Group Activity, you can now start to add known and anonymous individuals to it as participants. Any supports provided to individuals accessing the homelessness system who have not consented to be on HIFIS (i.e., refused to be on HIFIS or have not completed an intake yet) should be entered using Anonymous Attendees only. You can update the Group Activity throughout the day.

Procedure:

1. From the Front Desk menu, select **Group Activities.**
2. In the **Group Activity List** page, Click the **Manage** icon under the Action column for the group activity you want to add participants to.
3. Once in the **Manage Group Activity** page, under the **Attendees** tab, there is a **Client Name(s)** field which is a place to search and add clients who have profiles in HIFIS to the group activity. Next to it there is an **Anonymous Attendees**, which is a place to add the total number of participants who attended the group activity, but do not have profile in HIFIS.
4. To add clients who are in HIFIS, click in the **Client Name(s)** field to search for the client.

   When you found the client you want to add, click the **Plus icon** to add the client to the group activity. Once this step is completed, you should see the client's name with basic information show in the Attendees list. Complete this step for all clients who are in HIFIS.
5. To add clients who are not in HIFIS, use the up and down toggle in the **Anonymous Attendees** field to enter the total number, or alternatively you can input the number directly without using the toggle.
6. Click the **Save icon** when done.

Do not use the **Attended** Yes/No toggle field when recording attendance for clients in HIFIS.



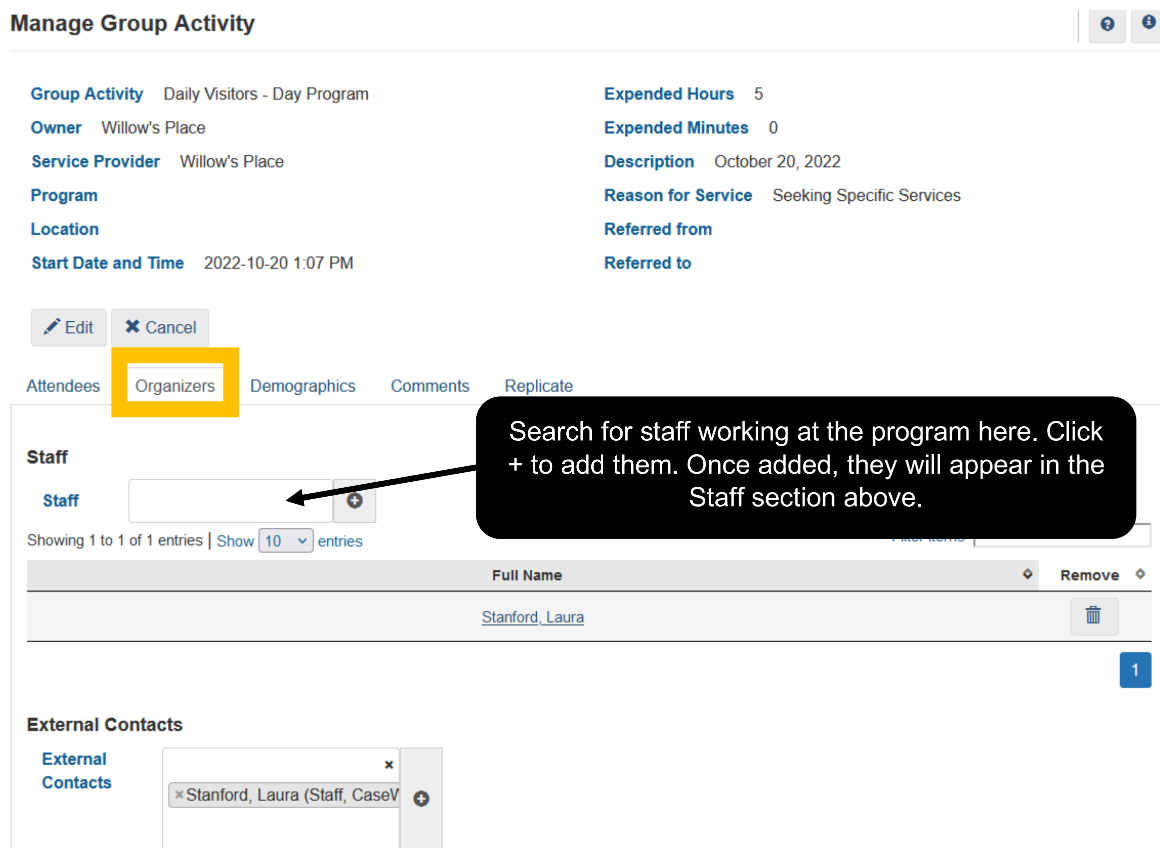
How to add organizers to a Group Activity

You can add information about the staff who were on shift during or led a group activity.

Procedure:

1. From the Front Desk menu, select **Group Activities.**
2. In the **Group Activity List** page, Click the **Manage** icon under the Action column for the group activity.
3. Once in the **Manage Group Activity** page, go to the **Organizers** tab.
4. Once in the **Organizers** tab, there is a **Staff** field which is a place to search and add staff who are HIFIS users to the group activity. Click in the **Staff** field to search and add staff. Click the **Plus icon** to add them to the group activity. Once this step is completed, you should see the staff person's name show in the Staff list. Complete this step for all staff who were on shift or led the group activity.

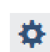
Do not use this feature to add external contacts to the group activity.

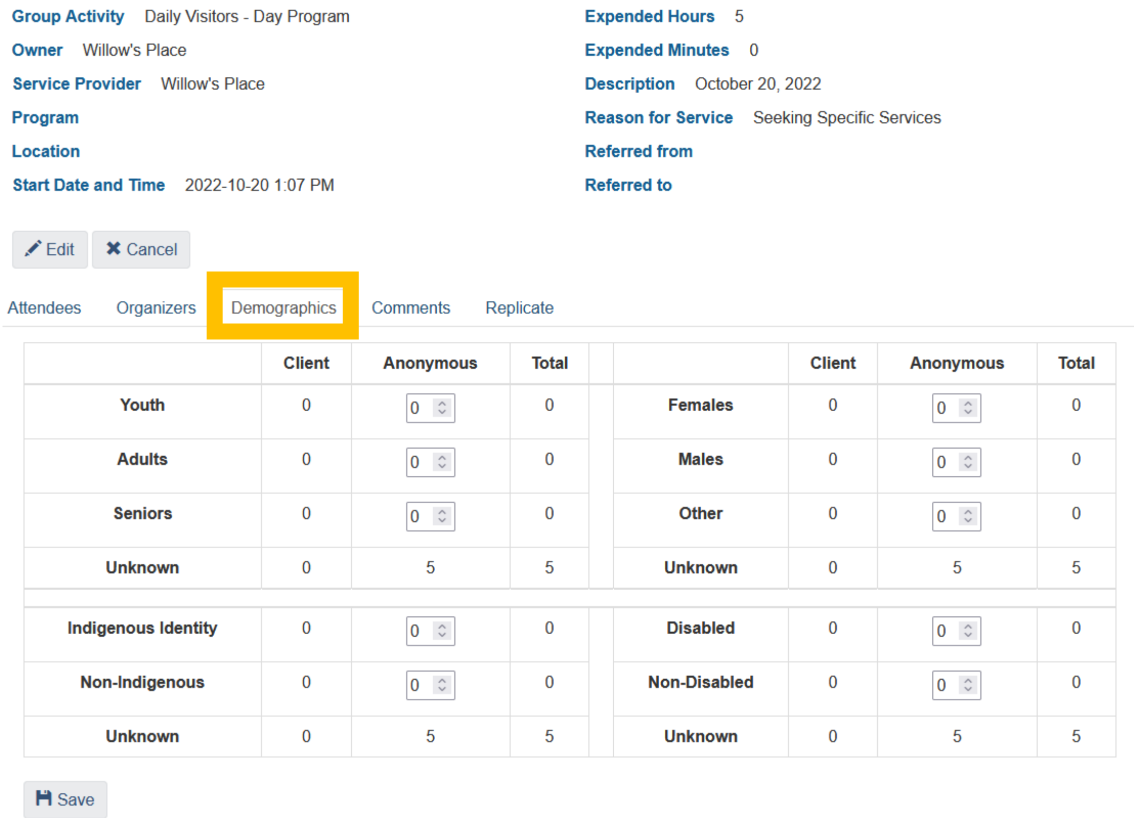


How to add participant demographics to a Group Activity

You can add demographic information about anonymous individuals in this section. Demographic information for individuals with a client record in HIFIS will appear automatically and should not be added manually.

Procedure:

1. From the Front Desk menu, select **Group Activities.**
2. In the **Group Activity List** page, Click the **Manage** icon  under the Action column for the group activity.
3. Once in the **Manage Group Activity** page, go to the **Demographics** tab.
4. Once in the **Demographics** tab, use the up and down toggles to enter the total number of anonymous attendees who identify with the demographic options available. Alternatively, you can input the number directly without using the toggles. You should not enter any information on this page for individuals that have a client profile in HIFIS.



Group Activity Daily Visitors - Day Program
Owner Willow's Place
Service Provider Willow's Place
Program
Location
Start Date and Time 2022-10-20 1:07 PM

Expended Hours 5
Expended Minutes 0
Description October 20, 2022
Reason for Service Seeking Specific Services
Referred from
Referred to

Edit Cancel

Attendees Organizers Demographics Comments Replicate

	Client	Anonymous	Total		Client	Anonymous	Total
Youth	0	0	0	Females	0	0	0
Adults	0	0	0	Males	0	0	0
Seniors	0	0	0	Other	0	0	0
Unknown	0	5	5	Unknown	0	5	5
Indigenous Identity	0	0	0	Disabled	0	0	0
Non-Indigenous	0	0	0	Non-Disabled	0	0	0
Unknown	0	5	5	Unknown	0	5	5

Save

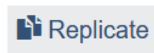
How to replicate a Group Activity

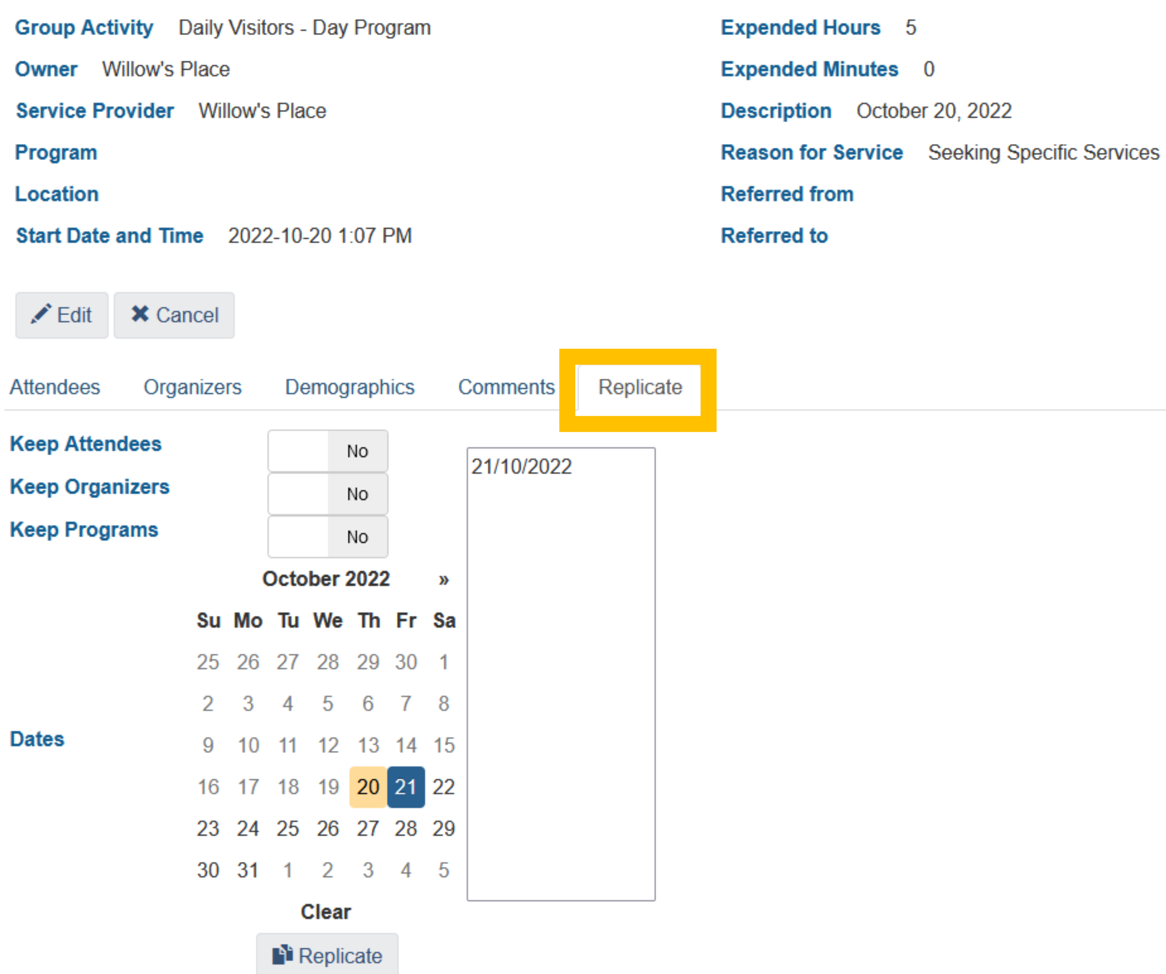
If the same group activity is provided often and has a lot of the same set up information, you have the option to replicate it for one or multiple dates in the future. When replicating a group activity, you must choose what information you want to replicate.

Procedure:

1. From the Front Desk menu, select **Group Activities**
2. In the **Group Activity List** page, Click the **Manage** icon under the Action column for the group activity.
3. Once in the **Manage Group Activity** page, under the **Replicate** tab, you will need to identify the information needed and complete the following actions as guided:
    - **Keep Attendees:** Do not use and keep as “No”
    - **Keep Organizers:** Toggle to “yes” if the staff on shift or leading the group activity is the same for the new group activity.
    - **Keep Programs:** Toggle to “yes” if the program the group activity was delivered under is the same for the new group activity.

- **Dates:** Select one or more dates that you want to replicate the group activity for in the calendar

4. Click **Replicate** when done 



Case Management Supports

Introduction to Case Management

Procedures included in this section:	• How to open a Case • How to update and maintain a Case • How to add Case Sessions • How to close a Case
Programs required to use the Case Management Module:	Emergency Shelters, Shelter-Based Early Intervention Pilot Programs, Transitional Living Programs, Rapid-Rehousing Programs, Intensive Case Management Programs, Permanent Supportive Housing Programs

The Case Management module in HIFIS is used to record information about the case management supports provided to a client including the case goal, status, session details, and case notes.

Case sessions and notes are not automatically accessible to everyone who has access to HIFIS. Based on your role and position within your organization, you may or may not be able to view session and note details in case management.

Case Management should continue as one continuous record, regardless of if the client has housing transitions while supports are ongoing.

When to open a case: As soon as a case manager is assigned to and begins supporting a client.

When to update a case status: Each time a case milestone has changed or has been reached (i.e., case is changing from Intake to Ongoing, Ongoing to Closed, etc.).

When to close a case: A case management record should be closed when the client is no longer being supported. This can occur when the client is:

- Housed without housing retention support being provided,
- Housed with housing retention support ending and milestones reached,
- Transferred to a City-funded TLP or PSH program,
- Declining to start or continue supports,
- Unable to be reached to start or continue supports,
- Voluntarily leaving or not returning to a TLP or PSH program,
- Asked to leave a program, or
- Transferred to another RRH, ICM, TLP, or PSH case manager.

For Reaching Home funded programs, a case should remain open as outlined below - unless follow-ups are not expected to be completed for one of the reasons listed above:

- Early Intervention: Case should remain open until 3-month milestone is reached and housing retention supports have ended.
- TLP: Case should remain open until 3-month milestone and housing retention supports have ended. *Note – housing placement record should remain open for 12 months.*
- RRH and ICM: Case should remain open until 12-month milestone is reached and housing retention supports have ended.

Individuals supported together should share one case: Families and two-person households (for example, couples, siblings, etc.) who are receiving case supports together must have one shared case, not separate cases for each person. This ensures that the case information is recorded in one place and accurately reflects how the household is being supported.

More information about case management data entry is available in Appendix C: Frequently Asked Questions.

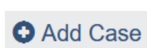
There are two ways to access the Case Management module:

1) From the Front Desk
2) From the Client's Profile

How to open a Case

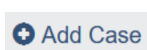
Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Case Management.**
2. Select the **Add Case** button 

3. Fill in all required fields as per the data entry requirements below.
4. Click **Save** when done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Case Management**
3. Select the **Add Case** button 

4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name	Level 1 - Required	Will only appear when creating the case through the Front Desk. Search for the client that is receiving the case management supports in the field search function. Family Sector should search for the Family Head. If the individual selected is part of a family, a separate family members field will appear.
Family Members	Level 3 – Situationally Required	Will only appear if the client selected for the case is part of a family. The list of family members will pre-populate. Add all family members to the case by using the plus symbol for this field.
Caseworker	Level 1 - Required	Will pre-populate to the user creating the record. The Caseworker should always be the primary case manager who will be providing and coordinating case management supports to the client. This field does not require editing/updating if another staff person is providing coverage for a brief period (i.e., primary case manager on vacation). **Emergency Shelters only** – If the primary shelter-based case manager is no longer supporting the client and they have been assigned a new shelter-based case manager, you should update the Case Worker information in this field. **For RRH, ICM, TLP, PSH** – If the primary case manager is no longer supporting the client and they have been assigned a new case manager, the case should be closed and a new case opened with the new primary case manager identified.

Goal	Level 1 - Required	Select “Housing-Focused Supports”
Status	Level 1 - Required	When opening a case, select one of the appropriate values from the options listed: • **Intake Stage:** The case manager is actively working to make initial contact with the client to offer them support or is working with them to discuss their needs, goals, and case plan. Applicable to all programs. • **Ongoing – Housing Search Supports:** The client is actively being supported by a case manager on an ongoing basis while they are homeless. The case status should be updated to this when the client has opted to work with the Case Manager and a case plan has been drafted. Applicable to all programs except PSH. • **Ongoing – Housing Retention Supports:** The client is actively being supported by a case manager on an ongoing basis while they are housed, including being housed in a city-funded PSH program. The case status should be updated to “Open – Housing Retention” when the client has moved into housing and is continuing to be supported to retain housing after moving in. Note – the Status of the Case should be updated throughout the duration of supports as needed. See the How to update and maintain a Case section below for more guidance on this topic.
Start Date and Time	Level 1 - Required	Enter the date and time the case management supports started with the client. Will auto-populate to current date and time but can be manually updated.
Target Date	Optional	If used, enter the date that the client has identified as their target date for reaching their goal. This could include a target date for securing housing or moving into housing.

Program	Level 1 - Required	Select the appropriate program/service that the individual is accessing. For single service programs, the program field will pre-populate to the appropriate value. For programs that offer more than one type of case management supports, select the appropriate value. For programs that offer more than one service – if the client is changing programs (i.e., changing from RRH to ICM or vice versa), you will need to close the case and open a new one in the appropriate program.

How to update and maintain a Case

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Case Management.**
2. In the **Case Management List** page, locate the case record that you want to modify and click the **Edit** icon  under the Actions column.
3. On the **Client – Edit Case Management** page, edit the information recorded for the case as per the data entry requirements below.
4. Click **Save** when done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management** → **Case Management**
3. locate the case record that you want to modify and click the **Edit** icon  under the Actions column.
4. On the **Client – Edit Case Management** page, edit the information recorded for the case as per the data entry requirements below.
5. Click **Save** when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name	N/A	Not applicable – should never change
Family Members	Level 3 – Situationally Required	Add any missing family members to the case if needed.
Caseworker	Level 1 – Required	The Caseworker should always be the primary case manager who will be providing and coordinating case management supports to the client. This field does not require editing/updating if another staff person is providing coverage for a brief period (i.e., primary case manager on vacation). **Emergency Shelters only** – If the primary shelter-based case manager is no longer supporting the client and they have been assigned a new shelter-based case manager, you should update the Case Worker information in this field. **For RRH, ICM, TLP, PSH** – If the primary case manager is no longer supporting the client and they have been assigned a new case manager, the case should be closed and a new case opened with the new primary case manager identified.
Goal	N/A	Not applicable – should never change
Status	Level 1 - Required	Note – the Status of the Case should be updated throughout the duration of supports as needed. When updating a case status, select the appropriate value from the options listed: • **Ongoing – Housing Search Supports:** The client is actively being supported by a case manager on an ongoing basis while they are homeless. The case status should be updated to this when the client has opted to work with the Case Manager and a case plan has been drafted. Applicable to all programs except PSH. • **Ongoing – Housing Retention Supports:** The client is actively

		being supported by a case manager on an ongoing basis while they are housed, including being housed in a city-funded PSH program. The case status should be updated to "Open – Housing Retention" when the client has moved into housing and is continuing to be supported to retain housing after moving in. If you are closing the case, see the How to Close a Case section below.
Start Date and Time	Level 1 – Required	Should be updated if original entry is inaccurate.
Target Date	Optional	Optional to update if the target date for the client to achieve their goal(s) has changed.
Program	N/A	Do not change once the case has been opened. For programs that offer more than one service – if the client is changing programs (i.e., changing from RRH to ICM or vice versa), you will need to close the case and open a new one in the appropriate program.

How to close a Case

A case management record should be closed when the client is no longer being supported. This can occur when the client is:

- Housed without housing retention support,
- Housed with housing retention support ending and milestones reached,
- Transferred to a City-funded TLP or PSH program,
- Declining to start or continue supports,
- Unable to be reached to start or continue supports,
- Voluntarily leaving or not returning to a TLP or PSH program,
- Asked to leave a TLP or PSH program, or
- Transferred to another case manager.

For Reaching Home funded programs requiring 3-month (Early Intervention) or 12-month (RRH, ICM, TLP) milestone follow-ups, cases should remain open until the required milestone is reached – unless follow-ups are not expected to be completed for one of the reasons mentioned above.

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Case Management.**
2. In the **Case Management List** page, locate the case record that you want to modify and click the **Edit** icon under the Actions column.
3. On the **Client – Edit Case Management** page, edit the information recorded for the case as per the data entry requirements below.
4. Click **Save** when done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Case Management.**
3. In the **Client – Case Management List** page, locate the case record that you want to close, and click the **Edit** icon under the Action column for that case.
4. On the **Client – Edit Case Management** page, edit the information recorded for the case as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name	N/A	Not applicable – should never change
Family Members	Level 3 – Situationally Required	Before closing the case, ensure all family members have been included in the case if applicable.
Caseworker	Level 1 – Required	Before closing the case, ensure the caseworker listed is accurate. The Caseworker should always be the primary case manager who will be providing and coordinating case management supports to the client. This field does not require editing/updating if another staff person is providing coverage for a brief period (i.e., primary case manager on vacation).

		Emergency Shelters only – If the primary shelter-based case manager is no longer supporting the client and they have been assigned a new shelter-based case manager, you should update the Case Worker information in this field. **For RRH, ICM, TLP, PSH** – If the primary case manager is no longer supporting the client and they have been assigned a new case manager, the case should be closed and a new case opened with the new primary case manager identified.
Goal	N/A	Not applicable – should never change
Status	Level 1 - Required	Selecting the appropriate closing reason / status from the options listed: • **Closed – Housed (No Retention Support):** The client is housed in a unit/home that is not a city-funded Transitional Living (TLP) or Permanent Supportive Housing (PSH) program and will not be accessing housing retention/ stability supports and their case file closed. • **Closed – Housed (Retention Support Completed):** The client is stably housed in a unit/home that is not a city-funded Transitional Living (TLP) or Permanent Supportive Housing (PSH) program and no longer requires housing retention/ stability supports (i.e., successfully completed the program) and their case file closed. Programs should also use this option if a client is housed in a non-city funded PSH program. • **Closed – Transferred to City-Funded TLP:** Client has moved into one of the city-funded TLP programs and is no longer being supported and their case file closed. It is expected that TLP case managers take over as the primary support for the client. City-funded TLP programs can also use this if a client leaves their

		program to move into another city-funded TLP program. City funded TLP programs currently include: Wesley Youth Housing and YWCA – TLP.
		• **Closed – Transferred to City-Funded PSH:** Client has moved into one of the city-funded Permanent Supportive Housing programs and is no longer being supported and their case file closed. It is expected that the PSH case managers take over as the primary support for the client. City-funded PSH programs can also use this if a client leaves their program to move into another city-funded PSH program. City funded PSH programs currently include: Good Shepherd Dorothy Day Place and Indwell 257 King William St.
		• **Closed – Declined to Start Supports:** The client has declined to start working with a case manager or program and their case file closed.
		• **Closed – Declined to Continue Supports:** The client has declined to continue working with a case manager or program and their case file closed.
		• **Closed – Unable to Reach to Start Supports:** For RRH and ICM only. The case manager has been unable to reach the client to offer supports and complete the intake process and their case file closed.
		• **Closed – Unable to Reach to Continue Supports:**
		    ○ **Early Intervention** – The case manager has been unable to reach the client or has lost contact with them and their case file closed.
		    ○ **Emergency Shelters** – There have been no interactions with the client

		for 90 days or more and their case file closed. For example, the case is closed because the client has not stayed at the Emergency Shelter for 90 days or more. ◦ **RRH and ICM** – The case manager has been unable to reach the client or has lost contact with them and their case file closed. ◦ **TLP and PSH** – Do not use. Use *Closed – Resident Left/Did Not Return* if a resident does not return and you have lost contact with them. • **Closed – Resident Left/Did Not Return:** The client has left/did not return to the city-funded TLP or PSH program and to the best of your knowledge did not leave for permanent housing. • **Closed – Asked to Leave (Involuntary):** The client has been asked to leave the program and is no longer being supported and their case file closed. Reasons may include but are not limited to: lack of engagement, court order, etc. • **Closed – Case Manager Transfer Within Program:** The client is being reassigned to a new primary case manager within the same program and service provider. Reasons could include, the client requested a new primary case manager, the primary case manager left the program, etc. **Emergency Shelters** – Do not use. Keep the same case open and update the Caseworker field if they are no longer supporting the client and the client has been assigned a new shelter-based case manager. • **Closed – Program Transfer:** The client is being reassigned to a new

		city-funded program based on their level of need. Case managers should select this option when one of the following occurs: ◦ **Early Intervention Pilot:** Client is no longer being supported through the Early Intervention program and is being transferred over to start ongoing shelter-based case supports. A new case should be opened with an Emergency Shelter case worker. ◦ **RRH and ICM:** Client has been identified as needing more intensive supports (ICM) or less intensive supports (RRH), and that program will take over as the primary support program for the client. • **Closed – Staying with Public Institution:** The client is now staying with a public institution and is no longer being supported and their case file closed. Public Institutions include, but is not limited to: correctional facility/jail, Hospital, Recovery/Treatment facility, etc. • **Closed – Deceased:** The client is known to be deceased. • **Closed – Duplicate/ Error Record:** The case management record was created in error and/or is a duplicate. • **Closed – Status Unknown:** The program is no longer in contact with the client, and their current status or outcome cannot be confirmed. • **Closed – QA (COH Admin):** For City of Hamilton HIFIS Administrators only. The case management record has been flagged due to inactivity during

		routine quality assurance activities and closed. • **Closed – EI 3-Month Status: Still Housed:** The client is stably housed at 3-months in a unit/home that is not a city-funded Transitional Living (TLP) or Permanent Supportive Housing (PSH) program and no longer requires housing retention/ stability supports (i.e., successfully completed the program) and their case file closed. Programs should also use this option if a client is housed in a non-city funded PSH program. • **Closed – EI 3-Month Status: Returned to Homelessness:** Client is no longer housed and has returned to homelessness. • **Closed – EI 3-Month Status: In Public Institution:** Client is no longer housed and is now staying with a public institution and is no longer being supported and their case file closed. Public Institutions include, but is not limited to: correctional facility/jail, Hospital, Recovery/Treatment facility, etc. • **Closed – EI 3-Month Status: Left Housing to Stay with Family:** Client is no longer housed is now temporarily staying with family. • **Closed – EI 3-Month Status: Deceased:** Client is no longer housed and known to be deceased. • **Closed – EI 3-Month Status: No Longer Housed (Other Reason):** Client is no longer housed for a reason other than the options available. • **Closed – EI 3-Month Status: Unable to Reach:** The client is unable to be reached to confirm their housing status at 3-months or the case manager has lost contact with them.

Start Date and Time	Level 1 – Required	Before closing the case, ensure the start date and time for when case supports started is accurate.
Target Date	Optional	Optional to add or update if the target date for the client to achieve their goal(s) has changed.
End Date and Time	Level 2 – Required	Once any “Closed” status has been selected an **End Date and Time** fields will appear. Update the **End Date** field with the date the supports ended. Use the calendar to search for the date to avoid data entry errors. Format: YYYY-MM-DD Optional to add a specific time.
Program	N/A	Do not change once the case has been opened. For programs that offer more than one service – if the client is changing programs (i.e., changing from RRH to ICM or vice versa), you will need to close the case and open a new one in the appropriate program.

How to add Case Sessions

Case Sessions are used to record information about case support interactions and activities that occurred with the client, or on their behalf, and the nature of those interactions and supports.

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Case Management.**
2. In the **Case Management List** page, locate the case record that you want to add an activity/session to, and click the **Display** icon under the Action column for that case.
3. Once in the **Display Case Management** page, go to the **Sessions** tab.

4. Click the **Add Session** button.
5. Fill in all required fields as per the data entry requirements below.
6. Click **Save** when you are done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Case Management**.
3. In the **Client – Case Management List** page, locate the case record that you want to add an activity/session to, and click the **Display** icon  under the Action column for that case.
4. Once in the **Display Case Management** page, go to the **Sessions** tab.

5. Click the **Add Session** button.
6. Fill in all required fields as per the data entry requirements below.
7. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Activity	Level 1 - Required	Identify the activity / interaction that took place with the client or on their behalf. Select the appropriate value from the options available in the dropdown field. **Refer to Appendix B for definitions for each available option.** 1. Intake - Initial Contact 2. Intake - Needs Assessment 3. Intake - Goal Setting 4. Intake - Service Plan Completed 5. Intake - PSH Support Plan Completed 6. Meeting - Scheduled Check-In 7. Meeting - Additional Client Interaction 8. Meeting - Goal Progress Review 9. Phone Call/Email - Scheduled Check-In 10. Phone Call/Email - Additional Client Interaction 11. Client No Show 12. Contact Attempt 13. Accompanying Client to Appointments 14. Client Empowerment 15. Housing Support - Housing Search Support 16. Housing Support - Application (Social Housing) 17. Housing Support - Application (TLP, PSH) 18. Housing Support - Application (Private Market) 19. Housing Support - Move In Support 20. Housing Support - Landlord Negotiations 21. Housing Support - Mediation 22. Housing Support - Eviction Prevention 23. Referrals and Liaising - Education Services 24. Referrals and Liaising - Employment Services 25. Referrals and Liaising - Financial & Income Supports 26. Referrals and Liaising - Harm Reduction Services 27. Referrals and Liaising - Social Housing Programs 28. Referrals and Liaising - TLP 29. Referrals and Liaising - PSH 30. Referrals and Liaising - RCF 31. Referrals and Liaising - Landlords (Private Market) 32. Referrals and Liaising - Indigenous Services 33. Referrals and Liaising - Legal Services 34. Referrals and Liaising - Mental Health Services 35. Referrals and Liaising - Newcomer Services 36. Referrals and Liaising - Other Supports 37. Referrals and Liaising - Pet Services 38. Referrals and Liaising - Physical Health Services

		39. Referrals and Liaising - Prenatal/Parental Supports 40. Crisis Intervention - Emergency Assistance 41. Crisis Intervention - Immediate Safety Planning 42. Crisis Intervention - Conflict Resolution 43. Emergency Response - Addressing Immediate Needs 44. Emergency Response - Crisis Counselling 45. Social Support - Connecting with Community Groups 46. Social Support - Building Social Networks 47. Admin - Case Conference Notes 48. Admin - Completing Forms 49. Admin - Updating Client Records 50. Admin - Case and Case Notes 51. Admin - Primary Case Worker Transfer
Description	Level 1 - Required	Add information relevant to the activity including: • More details about the primary activity/discussion that took place during the interaction or on behalf of the client. • Next steps for both the case manager and client, if applicable. • Any other information relevant to the case management supports or interaction. • **For PSH programs** – document details of key activities that took place during the week.
Date and Time	Level 1 - Required	Enter the date and time the activity or interaction took place with the client or on behalf of the client (e.g., referrals made in between meetings with clients)
Expended Hours	Optional	Optional to add the hours spent with the client. Can be used with the minutes.
Expended Minutes	Optional	Optional to add the minutes spent with the client. Can be used with the hours.
Caseworker	Level 1 - Required	Search and add the case manager who interacted with the client or completed an activity in between in-person meetings on their behalf. The case manager must have a user account in HIFIS in order to search for them. The case manager selected does not need to be the primary case manager for the case overall.
Client Present	Optional	Toggle to “Yes” if the client was present during the activity or interaction that took place. Leave as “No” if the client was not present and the activity took place in between meetings on behalf of the client.
Family Present	Optional	Applicable to families only.

		Toggle to “Yes” if family members were present during the activity or interaction that took place. Leave as “No” if family members were not present and the activity took place in between meetings on behalf of the family and its members.

Housing Placement Supports (Reaching Home)

Introduction to Housing Placements

Procedures included in this section:	• How to open a Housing Placement
	• How to add property viewings / inquiries (i.e., Attempts in HIFIS)
	• How to close a Housing Placement due to early exit
	• How to document a move to a city-funded TLP or PSH program
	• How to document a move to other types of housing
	  ○ Step 1: Provide Housing Details (Secure Housing)
	  ○ Step 2: Complete Move-In Process (Move In)
	• How to document post-move-in status updates (i.e. Follow-Ups in HIFIS)
	• How to close a Housing Placement

Programs required to use the Housing Placement module to document Housing Placement Supports:	Rapid-Rehousing Programs, Intensive Case Management Programs, Transitional Living Programs

The Housing Placement module records support and services related to finding, securing, and maintaining housing, while the Case Management module tracks a client's overall support. It includes information about:

- When a housing search started to take place,
- Details of property viewings or inquiries that took place (called "Attempts" in HIFIS),
- Date housing was secured,
- Move-in details such as address and move in date,
- Details of post-move-in status updates that were completed (called "Follow Ups" in HIFIS),
- Date supports have ended, and client has left the program.

The Housing Placement module is the primary data source for programs funded by the Federal Reaching Home program to provide Housing supports. This includes Rapid Rehousing, Intensive Case Management, and Transitional Living Programs who are directly supporting clients with their housing search and retention needs.

Each intervention type has their own data entry expectations based on Reaching Home Annual Results Reporting Requirements (RROL), as well as specific reporting requirements outlined in program contracts.

The current data entry requirements for this module, based on each intervention type, are as follows:

Data entry requirements	RRH	ICM	TLP
1. **Open a Housing Placement Record** when housing search supports have started	✓	✓	✓
2. **Document property viewings or inquiries** during the housing search period (i.e., Add Attempts in HIFIS)	✓	✓	
3. **Close a Housing Placement record when supports end early** (i.e., early exit from program)	✓	✓	✓
4. **Document move-ins to city-funded TLP or PSH program,** when applicable	✓	✓	✓
5. **Document move-ins to other types of housing at specific addresses,** when applicable	✓	✓	✓
a. **Document a 3-month post-move-in status update** to confirm if the client is still housed at the address, when applicable (i.e., Add a Follow Up in HIFIS)			✓
b. **Document a 12-month post-move-in status update** to confirm if the client is still housed at the address, when applicable (i.e., Add a Follow Up in HIFIS)	✓	✓	✓
c. **Optional to document additional post-move-in status updates** to confirm if the client is still housed at the address, when applicable (i.e., Add Follow Ups in HIFIS)	✓	✓	✓
6. **Close a Housing Placement Record** when housing search or retention supports are no longer being provided	✓	✓	✓

When to open a housing placement record:

Housing Placement records are address specific. A client requires a housing placement record each time they are being supported to search, secure, and sustain housing **at each address.**

The housing placement record should be opened once housing supports have started. As a standard business practice, we recommend opening the housing placement record when the intake process with the client has been completed and a case plan and goals are in place. When the primary case manager updates the Case record from “Intake Stage” to one of the “Ongoing” support options, they should open the Housing Placement.

When to close a housing placement record: A housing placement record should be closed when the client is no longer being supported. This can occur when the client is:

- Housed without housing retention support being provided,
- Housed with housing retention support ending and milestones reached,
- Transferred to a City-funded TLP or PSH program,
- Declining to start or continue supports,
- Unable to be reached to continue supports,
- Voluntarily leaving or not returning to a TLP,
- Asked to leave a program, or
- Transferred to another RRH, ICM, or TLP case manager.

When to initiate opening a secondary housing placement record while supports are ongoing:

Scenario 1: If the individual has left the listed address in the primary housing placement record and has returned to homelessness (even for just a day), their primary housing placement record should be updated and closed, and a new secondary housing placement service opened to reflect that a new housing search has started with the client. The new housing placement should have the appropriate dates added (i.e., when the new housing search started, when new housing was secured, etc.)

Scenario 2: If the individual remains housed at the listed address in the primary housing placement record, but is being supported to be re-housed elsewhere, their primary housing placement record should remain open until they move out, and a secondary housing placement service opened to reflect that a new housing search has started with the client. The secondary housing placement should have the appropriate dates added (i.e., when the new housing search started, when new housing was secured, etc.)

When to correct errors in housing placement records:

When it is identified that something in the main record is inaccurate. Note – the following information cannot be edited or updated once the housing placement record is closed: Housing Placement End Date, Housing Secured Date, and Date Moved In. If significant data entry errors were made that impact reporting, please contact HIFIS@hamilton.ca to determine if the issue can be addressed. Minor data entry errors (i.e., move in date off by a few days) are considered low-priority and will not be addressed.

How to open a Housing Placement

Housing Placement records are address specific. A client requires a housing placement record each time they are being supported to search, secure, and sustain housing at each address.

The housing placement record should be opened once housing supports have started. As a standard business practice, we recommend opening the housing placement record when the intake process with the client has been completed and a case plan and goals are in place. When the primary case manager updates the Case record from “Intake Stage” to one of the “Ongoing” support options, they should open the Housing Placement.

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Housing → Housing Placements**
2. Select the **Add Housing Placement** button Add Housing Placement
3. Fill in all required fields as per the data entry requirements below.

4. Click **Start Housing Placement** when done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Housing Placements**
3. Select the **Add Housing Placement** button Add Housing Placement
4. Fill in all required fields as per the data entry requirements below.
5. Click **Start Housing Placement** when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name	Level 1 - Required	Will only appear when creating the housing placement through the Front Desk. Search for the client that is receiving the housing supports in the field search function. Locations serving families should search for the Family Head. If the individual selected is part of a family, a separate family members field will appear.
Family Members	Level 3 – Situationally Required	Will only appear if the client selected for the housing placement is part of a family. The list of family members will pre-populate. Add all family members to the housing placement by using the plus symbol for this field.
Caseworker	Level 1 - Required	Will pre-populate to the user creating the record. The Caseworker should always be the primary case manager who will be providing housing supports to the client.

		This field does not require editing/updating if another staff person is providing coverage for a brief period (i.e., primary case manager on vacation), or for other case managers to add attempts or follows up to the housing placement. If the primary case manager is no longer supporting the client and they have been assigned a new case manager, the housing placement should be closed and a new housing placement opened with the new primary case manager identified.
Housing Type(s) Sought	Level 2 - Required	Select the type(s) of housing that the client is seeking from the options listed: The list of options to choose from only includes housing types considered as "Housed". In Hamilton, an individual in Transitional Housing is still considered homeless until permanently housed. As a result, Transitional Housing is not included in the list. Also note, the list is not in alphabetical order in HIFIS. • **Home Ownership:** Client is seeking a house/unit that they will own. • **Housed in Family's House / Apartment:** Client is seeking to be stably housed in a family's residence and not paying rent to a private/public landlord. Different from couch surfing. • **Lodging House:** Client is seeking housing in a licensed lodging house. Typically, lodging houses offer private rooms without on-site access to kitchen facilities. • **Rental at Market Price:** Client is seeking housing in a private market rental unit. • **Rental at Market Price with Rent Subsidy:** Client is seeking housing in a private market rental unit with a monthly rent supplement benefit/payment. • **Residential Care Facility:** Client is seeking housing in a Residential Care Facility offering

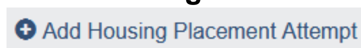
		communal living to people who require assistance with daily activities in life. This includes group homes. • **Single Room Occupancy:** Client is seeking housing in a private market rental unit that is a shared dwelling with rooms leased individually. • **Social/Community Housing:** Client is seeking housing in a social/community housing unit including rent-geared to income units. • **Supportive Housing:** Client is seeking housing in an affordable permanent supportive housing unit offering coordinated wrap around services and supports to tenants.
Search Started Date	Level 1 - Required	Enter the housing placement start date. In general, this should be the date that housing supports start. As a standard business process, we recommend the search started date be the date the primary case manager updates the case status in case management from “Intake Stage” to “Open”.
Target Date	Optional	If used, enter the date that the client has identified as their goal to find housing by.
Program	Level 1 - Required	Select the appropriate program/service that the individual is accessing. For single service programs, the program field will pre-populate to the appropriate value. For programs that use the Housing Placement module to record supports for multiple programs, select the appropriate value.

How to add property viewings /inquiries (Attempts)

Housing Placement Attempt records are used to note information on property viewings or inquiries that took place in an organized way.

Procedure:

1. Go to the client’s profile page.
2. Go to **Client Management → Housing Placements.**

3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon  under the Action column for it.
4. Once in the **Housing Placement Details – Housing Not Secured** page, click the **Add Housing Placement Attempt** button 

5. Fill in all required fields as per the data entry requirements below.
6. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Date Attempted	Level 1 - Required	Enter the date the property viewing or inquiry took place. Will auto-populate to current date and time but can be manually updated.
Reason Housing Not Secured	Level 1 - Required	Enter the reason the property viewing or inquiry was not successful (i.e., the reason the client will not be moving into the property). Select the appropriate value from the options listed. Note – this dropdown is also used when ending a housing placement and not all options listed in HIFIS are applicable to attempts (viewings). Please select one of the following options applicable to property viewings / inquiries: • **Area/Neighbourhood not a Suitable Fit:** The unit was not in an area/neighbourhood that met the client’s housing requirements or preferences. • **Client Did Not Show for Viewing:** Client did not show for the appointment to view the unit. • **Landlord Did Not Show for Viewing:** Landlord did not show for the appointment to show the unit. • **Landlord not Willing to Rent to Client:** Landlord informed the

		client or staff that they were unwilling to rent to client or did not return phone calls when client or staff reached out. • **Landlord Rented to Another Party:** Landlord informed the client or staff that they rented the available unit to someone else. • **Physical Unit not a Suitable Fit:** The viewed unit was in poor condition or did not meet the housing requirements or preferences of the client (i.e., client requires access to an elevator for mobility reasons).
Caseworker	Level 1 - Required	Search and add the case manager who arranged, attended, or inquired about the property for the client. The case manager must have a user account in HIFIS in order to search for them. The case manager who arranged, attended, or inquired about the property does not need to be the primary case manager for the housing placement overall; however, they do need to be from the same program or else you will not be able to search for them.
Final Attempt	Level 3 – Situationally Required	Leave as "No". Only toggle to yes if: • The viewing was unsuccessful, and the client is no longer being supported with their housing search. Toggling to yes will end the entire housing placement.
Comments	Optional	Optional to add additional information about the viewing

How to close a Housing Placement due to early exit

A housing placement record can be closed early (i.e., before a client is housed) when the client is:

- Transferred to a City-funded TLP or PSH program,

- Declining to continue supports,
- Unable to be reached to continue supports,
- Voluntarily leaving or not returning to a TLP,
- Asked to leave a program, or
- Transferred to another RRH, ICM, or TLP case manager.

Procedure:

1. Go to the client's profile page.
2. Go to **Client Management → Housing Placements.**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon under the Action column.
4. Once in the **Housing Placement Details – Housing Not Secured** page, Click the **End Housing Placement** button ✖ End Housing Placement
5. Fill in all required fields as per the data entry requirements below.
6. Click the **Save** button when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Date Attempted	Level 1 - Required	Enter the date the housing placement supports ended. Will auto-populate to current date and time but can be manually updated.
Reason Housing Not Secured	Level 1 - Required	Select the appropriate value from the options listed. Note – this dropdown is also used when recording an attempt (viewings) and not all options listed in HIFIS are applicable to ending a housing placement). • **Client Discharged – Voluntary:** Client voluntarily left the program providing the housing search supports. • **Client Discharged – Involuntary:** Client was asked to leave the program providing the housing search supports and was removed from caseload.

		• **Client Discharged – Client Did Not Return:** Staff were unable to reach the client, so they were removed from caseload so a new client could be supported. • **Client Transferred to RRH:** Client has transferred to city-funded RRH that will now act as the primary case manager for the client. • **Client Transferred to ICM:** Client has transferred to city-funded ICM program that will now act as the primary case manager for the client. • **Client is Deceased:** Client is known to be deceased. • **Not Applicable - Duplicate/Error Record:** The program has identified that the housing placement record is a duplicate or was created in error. • **Closed - QA (COH Admin Only):** For City of Hamilton HIFIS Administrators only. Indicates that the housing placement record was closed as part of routine quality assurance review and was deemed appropriate for closure.
Caseworker	Level 1 - Required	Search and add the primary case manager. The primary case manager should be the one to end the housing placement.
Final Attempt	Level 3 – Situationally Required	Toggle to “Yes”
Comments	Optional	Optional to add additional information about the viewing

How to document a move to a city-funded TLP or PSH

When a client moves into a city-funded Transitional Living or Permanent Supportive Housing program, that program will assume one-on-one support. When closing the housing placement, select the appropriate city-funded program under 'reasons housing not secured.' Any post-move-in support as part of the warm transfer should be documented in case management.

Note – Completing this process will mark the Housing Placement record as "Housing Placement Failed." However, the successful placement in a TLP or PSH is recorded in Housing Placement reports within Reports Manager.

Procedure:

1. Go to the client's profile page.
2. Go to **Client Management → Housing Placements.**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon under the Action column.
4. Once in the **Housing Placement Details – Housing Not Secured** page, Click the **End Housing Placement** button ✖ End Housing Placement
5. Fill in all required fields as per the data entry requirements below.
6. Click the **Save** button when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Date Attempted	Level 1 - Required	Enter the date the housing placement supports ended. Will auto-populate to current date and time but can be manually updated.
Reason Housing Not Secured	Level 1 - Required	Select the appropriate value from the options listed. Note – this dropdown is also used when recording an attempt (viewings) and not all options listed in HIFIS are applicable to ending a housing placement). • **Client Moved to Wesley Youth Housing TLP:** Client as moved to Wesley Youth Housing TLP program which includes on-site wrap-around supports. • **Client Moved to YWCA / YMCA – TLP:** Client has moved to either the YWCA or YMCA TLP transitional living program which

		includes on-site wrap-around supports. • **Client Moved to Dorothy Day Place PSH:** Client has moved to Good Shepherd Dorothy Day Place permanent supportive housing which includes on-site wrap-around supports. • **Client Moved to Indwell 257 King William St PSH:** Client has moved to City-Housing/Indwell 257 King William St permanent supportive housing which includes on-site wrap-around supports.
Caseworker	Level 1 - Required	Search and add the primary case manager. The primary case manager should be the one to end the housing placement.
Final Attempt	Level 3 – Situationally Required	Toggle to "Yes"
Comments	Optional	Optional to add additional information about the viewing

How to document a move to other types of housing

Step 1: Provide Housing Details (Secure Housing)

Procedure:

1. Go to the client's profile page.
2. Go to **Client Management → Housing Placements**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon under the Action column.
4. Once in the **Housing Placement Details – Housing Not Secured** page, click the **Add and secure a housing unit** button Add and secure a housing unit to add a unit.
5. Fill in all required fields as per the data entry requirements below.
6. Press **Save** when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

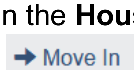
FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Housing Type	Level 1 - Required	Select the type(s) of housing that the client has secured from the options listed: The list of options to choose from only includes housing types considered as "Housed". In Hamilton, an individual in Transitional Housing is still considered homeless until permanently housed. As a result, Transitional Housing is not included in the list. Also note, the list is not in alphabetical order in HIFIS. • **Home Ownership:** Client has secured a house/unit that they will own. • **Housed in Family's House / Apartment:** Client has secured a space in a family's residence and not paying rent to a private/public landlord. Different from couch surfing. • **Lodging House:** Client has secured a unit in a licensed lodging house. Typically, lodging houses offer private rooms without on-site access to kitchen facilities. • **Rental at Market Price:** Client has secured housing in a private market rental unit. • **Rental at Market Price with Rent Subsidy:** Client has secured housing in a private market rental unit with a monthly rent supplement benefit/payment. • **Residential Care Facility:** Client has secured housing in a Residential Care Facility offering communal living to people who require assistance with daily activities

		in life. This includes group homes. • **Single Room Occupancy:** Client has secured housing in a private market rental unit that is a shared dwelling with rooms leased individually. • **Social/Community Housing:** Client has secured housing in a social/community housing unit including rent-geared to income units. • **Supportive Housing:** PSH units that are not city-funded. Client has secured housing in a non-city funded affordable permanent supportive housing unit offering coordinated wrap around services and supports to tenants.
Status	Level 1 - Required	Enter the condition of the unit. Select the appropriate value from the options listed. • Excellent • Good • Fair • Poor / Substandard • In Need of Repair • Not Suitable for Housing
Status Date	Level 1 - Required	Enter the date that the unit was last seen and assessed by the client and or case manager.
Place Name	Optional	Optional to enter the place/building name here, if applicable (e.g., Queens Place Residence)
Address Line 1	Level 1 - Required	Enter the street address here (e.g., 123 Hamilton Avenue)
Address Line 2	Optional	Optional to enter a second address line here, if applicable
Unit/Apartment Number	Level 3 – Situationally Required	When applicable, enter unit/apartment number (e.g., unit # 101)
Country	Level 1 - Required	Select the appropriate value from the options listed.
City (international)	Level 3 – Situationally Required	Will only appear if a Country other than Canada is selected.

		If the client is moving out of the country, enter the name of the international town/city the client is moving to
Postal Code (international)	Optional	Will only appear if a Country other than Canada is selected. If the client is moving out of the country, optional to enter the international postal code/zip code here
Province/Territory/State	Level 3 – Situationally Required	Will only appear if a Country other than Canada is selected. If the client is moving out of the country, optional to enter the international province/territory/state here.
Province/Territory	Level 1 - Required	Select the appropriate value from options listed. Can type "Ontario"
City	Level 1 - Required	Select the appropriate value from options listed. Can type "Hamilton"
Postal Code	Level 2 - Required	Enter the postal code here
Expected Move In Date	Level 2 - Required	Enter the expected move in date. This date will then show in the Housing Placement list for the client. Will auto-populate to current date and time but can be manually updated.

Step 2: Complete Move-In Process (Move-In)

Procedure:

1. Go to the client's profile page.
2. Go to **Client Management → Housing Placements,**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon  under the Action column.
4. Once in the **Housing Placement Details – Housing Secured** page, click the **Move In** button 

5. Fill in all required fields as per the data entry requirements below.
6. Click the **Move In** button when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Active Housing End Date	Level 1 - Required	Will only appear if the client has an active housing history record. Enter an end date for the previous housing. If the client has shared the specific or approximate date their previous housing has ended, please enter it. If the previous housing end date is unknown, please enter a date that is one-day prior to the move in date".
Rent	Optional	Optional to enter the total monthly market rent amount.
Move In Date	Level 1 - Required	Enter the move in date. Will auto-populate to current date and time but can be manually updated.
Use Exact Follow-up Date	Optional	Option to toggle to "Yes" to schedule in advance a specific date that the case manager plans to follow up with the client.
Months Until Follow-up	Optional	Option to schedule in advance the number of months in which the case manager plans to follow up with the client. The system will use the number entered and the move in date to set a specific date.

How to add post-move-in status updates (Follow Ups)

A Housing Placement Follow-Up record is used to note post move-in status updates about whether a client is still residing at the address they were placed in an organized way. Status check-ins can include phone calls or home visits. **Recording post move-in status updates is a requirement for all Federal Reaching Home Housing Placement programs.**

Procedure:

1. Go to the client's profile page.
2. Go to **Client Management → Housing Placements**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon ⚙ under the Action column.

4. Once in the **Housing Placement Details – Moved Into Housing** page, under the **Follow-Ups** tab, click the **Add Follow-Up** button Add Follow-up
5. Fill in all required fields as per the data entry requirements below.
6. Click the **Save** button when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Follow Up Date	Level 1 - Required	Enter the date the post-move-in status update occurred. Will auto-populate to current date and time but can be manually updated.
Months Elapsed	Optional	Option to add the number of months since the last post-move-in status update occurred with the client.
Final Follow-Up	Level 3 – Situationally Required	Leave as "No". Only toggle to yes if this was the final post-move-in status update and the client is no longer being supported to sustain their housing. Toggling to yes will end the entire housing placement.
Use Exact Follow-Up Date	Optional	Option to toggle to "Yes" to schedule in advance a specific date that the case manager plans to check in with the client.
Months Until Next Follow-Up	Optional	Option to schedule in advance the number of months in which the case manager plans to check in with the client. The system will use the number entered and the current follow up record date to set a specific date.
All Clients Still in Housing	Level 1 - Required	Select the appropriate value from the options listed: • Yes – Still Housed at Address • No • Unable to Contact • Client Declined Follow-Up • Closed – QA (COH Admin Only) If "No" is selected, an additional four fields will appear. Also, the Final Follow-Up field will automatically change to "Yes". Proceeding will end the housing

		placement for this client/individual at this address.
If No, Clients That Left Housing	Level 1 - Required	Will only appear if the client was identified as no longer housed at the address. The client and family members will be pre-populated. Add the client or all family members to the housing placement by using the plus symbol for this field.
If No, Reason Left Housing	Level 1 - Required	Will only appear if the client and family members were identified as no longer housed at the address. Select the appropriate value from options listed: • **Deceased:** Client is known to be deceased • **Evicted:** Client has been provided with a Notice of Eviction under the Residential Tenancies Act. • **Involuntary Departure:** Client discharged from program/unit. Reasons may include disagreement with rules, prolonged refusal to engage, disruptive behaviour, damages to room or building, non-payment of rent, etc. • **Moved to another Unit in Program**: **For PSH programs only.** Client has moved to another unit available in the permanent supportive housing program. • **Other:** Client has left housing for a reason not listed. • **Voluntary Departure/Move:** Client has chosen to leave the program, unit, or address where they were living.
If No, Date Left Housing	Level 3 – Situationally Required	Will only appear if the client was identified as no longer housed at the address. Enter the date the client left the address they were placed in.
If No, Is Housed Elsewhere	Level 3 – Situationally Required	Will only appear if the client was identified as no longer housed at the address. Leave as “No” if the client is now unhoused and without permanent or transitional housing.

		Toggle to “Yes” if the client has already moved to a new address and remain permanently housed. Note: completion of this field does not impact or update their Housing Status or new Housing History records in HIFIS.
Comments	Optional	Optional to add additional information about the viewing

How to close a Housing Placement

A housing placement record should be closed when the client is no longer being supported. This can occur when the client is:

- Housed without housing retention support being provided,
- Housed with housing retention support ending and milestones reached,
- Transferred to a City-funded TLP or PSH program,
- Declining to continue supports,
- Unable to be reached to continue supports,
- Voluntarily leaving or not returning to a TLP,
- Asked to leave a program, or
- Transferred to another RRH, ICM, or TLP case manager.

Procedure:

1. Go to the client’s profile page.
2. Go to **Client Management → Housing Placements.**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon under the Action column.
4. Once in the **Housing Placement Details – Moved Into Housing** page, under the **Follow-Ups** tab, click the **Add Follow-Up** button Add Follow-up
5. Toggle **“Final Follow-up”** to “Yes” and fill in all required fields as per the data entry requirements below.
6. Press the **Save** button when done. **Note: The Housing Placement End Date and Time is automatically set to the moment you press “Save” and cannot be changed or edited. Once the record is closed, the housing placement end date, secured date, and move in date cannot be changed or updated.**

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Follow Up Date	Level 1 - Required	Enter the date the follow up occurred. Will auto-populate to current date and time but can be manually updated.
Months Elapsed	Optional	Option to add the number of months since the last follow up occurred with the client.
Final Follow-Up	Level 3 – Situationally Required	Toggle to "Yes" Toggling to yes will end the entire housing placement.
All Clients Still in Housing	Level 1 - Required	Select the appropriate value from the options listed: • Yes – Still Housed at Address • No • Unable to Contact • Client Declined Follow-Up If "No" is selected, an additional four fields will appear. Also, the Final Follow-Up field will automatically change to "Yes". Proceeding will end the housing placement for this client/individual at this address.
If No, Clients That Left Housing	Level 1 - Required	Will only appear if the client is identified as no longer housed at the address. The client and family members will be pre-populated. Add the client or all family members to the housing placement by using the plus symbol for this field.
If No, Reason Left Housing	Level 1 - Required	Will only appear if the client was identified as no longer housed at the address. Select the appropriate value from options listed: • **Deceased:** Client is known to be deceased • **Evicted:** Client has been provided with a Notice of Eviction under the Residential Tenancies Act. • **Involuntary Departure:** Client discharged from program/unit. Reasons may include disagreement with rules, prolonged refusal to engage, disruptive behaviour, damages to room or building, non-payment of

		rent, etc. This can include returns to homelessness. • **Moved to another Unit in Program**: **For PSH programs only.** Client has moved to another unit available in the permanent supportive housing program. • **Other:** Client has left housing for a reason not listed. • **Voluntary Departure/Move:** Client has chosen to leave the program, unit, or address where they were living. This can include returns to homelessness.
If No, Date Left Housing	Level 3 – Situationally Required	Will only appear if the client was identified as no longer housed at the address. Enter the date the client/ left the address they were placed in.
If No, Is Housed Elsewhere	Level 3 – Situationally Required	Will only appear if the client was identified as no longer housed at the address. Leave as “No” if the client is now unhoused and without permanent or transitional housing. Toggle to “Yes” if the client has already moved to a new address and remain permanently housed. Note: completion of this field does not impact or update their Housing Status or new Housing History records in HIFIS.
Comments	Optional	Optional to add additional information about the viewing

Permanent Supportive Housing Programs – Unit Management

Procedures included in this section:	• How to assign a city-funded PSH unit to a resident
	  ○ Step 1: Open a Housing Placement Record for Resident
	  ○ Step 2: Secure the Unit for Resident
	  ○ Step 3: Complete Move-In Process for Resident
	• How to assign a city-funded PSH unit to a resident

Programs required to use the Housing Placement module to manage units:	Permanent Supportive Housing Programs

How to assign a city-funded PSH unit to a resident

Permanent Supportive Housing Programs that are city-funded have their units set up in HIFIS. Moving residents in and out of units (including moving them to another unit within the building) is done through the housing placement module.

Step 1: Open a Housing Placement Record for Resident

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Housing → Housing Placements**
2. Select the **Add Housing Placement** button Add Housing Placement
3. Fill in all required fields as per the data entry requirements below.
4. Click **Start Housing Placement** when done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Housing Placements**
3. Select the **Add Housing Placement** button Add Housing Placement
4. Fill in all required fields as per the data entry requirements below.
5. Click **Start Housing Placement** when done.

Data Entry Requirements:

See the [Field Level Data Entry Requirements]() section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name	Level 1 - Required	Will only appear when creating the housing placement through the Front Desk. Search for the client that is receiving the housing supports in the field search function. Locations serving families should search for the Family Head. If the individual selected is part of a family, a separate family members field will appear.
Family Members	Level 3 – Situationally Required	Will only appear if the client selected for the housing placement is part of a family. The list of family members will pre-populate. Add all family members to the housing placement by using the plus symbol for this field.
Caseworker	Level 1 - Required	Will pre-populate to the user creating the record.
Housing Type(s) Sought	Level 2 - Required	Select “Supportive Housing”
Search Started Date	Level 1 - Required	Enter the housing placement start date. For PSH programs, this can be the same as the move-in date.
Target Date	Optional	If used, enter the date that the client has identified as their goal to find housing by.
Program	Level 1 - Required	Select ”Supportive Housing (PSH)”

Step 2: Secure the Unit for Resident

Recommend only securing a unit if you are confident the client is moving in. If the client changes their mind and does not move in, you will need to contact HIFIS@hamilton.ca to release the unit for use.

Procedure:

1. Go to the client's profile page.
2. Go to **Client Management → Housing Placements.**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon under the Action column.
4. Once in the **Housing Placement Details – Housing Not Secured** page, click the **New Housing Search** button New Housing Search to search for a city-funded supportive housing unit. Optional Step: Use the **Filter Options** and select **"Only available to this service provider"**. **Press** Apply Filters.
5. In the **Housing Unit Search List** page, Click the plus button under the Action column to select the unit to secure for the client.
6. On the next pop-up screen, Fill in all required fields as per the data entry requirements.
7. Press **Secure Unit** when done. Secure Unit

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Housing Secured Date	Level 1 - Required	Enter the date the unit was secured. Will auto-populate to current date and time but can be manually updated. Can be the same as the move in date.
Expected Move In Date	Level 1 - Required	Enter the expected move in date. This date will then show in the Housing Placement list for the client. This field will auto-populate to current date and time but can be manually updated.

Step 3: Complete Move-In Process for Resident

Procedure:

1. Go to the client's profile page.
2. Go to **Client Management → Housing Placements,**

3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon under the Action column.
4. Once in the **Housing Placement Details – Housing Secured** page, click the **Move In** button
5. Fill in all required fields as per the data entry requirements below.
6. Click the **Move In** button when done.

Data Entry Requirements:

See the [Field Level Data Entry Requirements](#) section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Active Housing End Date	Level 1 - Required	Will only appear if the client has an active housing history record. Enter an end date for the previous housing. If the client has shared the specific or approximate date their previous housing has ended, please enter it. If the previous housing end date is unknown, please enter a date that is one-day prior to the move in date".
Rent	Optional	Optional to enter the total monthly market rent amount.
Move In Date	Level 1 - Required	Enter the move in date. Will auto-populate to current date and time but can be manually updated.
Use Exact Follow-up Date	Optional	Not applicable to move in process for PSH programs.
Months Until Follow-up	Optional	Not applicable to move in process for PSH programs.

How to unassign a city-funded PSH unit to a resident

Procedure:

1. Go to the client's profile page.
2. Go to **Client Management → Housing Placements.**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon under the Action column.

4. Once in the **Housing Placement Details – Moved Into Housing** page, under the **Follow-Ups** tab, click the **Add Follow-Up** button 

5. Toggle **"Final Follow-up"** to "Yes" and fill in all required fields as per the data entry requirements below.
6. Press the **Save** button when done. **Note: The Housing Placement End Date and Time is automatically set to the moment you press "Save" and cannot be changed or edited. Once the record is closed, the housing placement end date, secured date, and move in date cannot be changed or updated.**

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Follow Up Date	Level 1 - Required	Will auto-populate to current date and time but can be manually updated. Can leave as is or update to match the move out date.
Months Elapsed	Optional	Not applicable to move out process for PSH programs
Final Follow-Up	Level 3 – Situationally Required	Toggle to "Yes" Toggling to yes will end the entire housing placement.
All Clients Still in Housing	Level 1 - Required	Select "No" When "No" is selected, an additional four fields will appear. Proceeding will end the housing placement for this client/individual at this address.
If No, Clients That Left Housing	Level 1 - Required	Will only appear if the client is identified as no longer housed at the address. The client and family members will be pre-populated. Add the client or all family members to the housing placement by using the plus symbol for this field.
If No, Reason Left Housing	Level 1 - Required	Will only appear if the client was identified as no longer housed at the address. Select the appropriate value from options listed: • **Deceased:** Client is deceased • **Evicted:** Client has been provided with a Notice of Eviction under the Residential Tenancies Act.

		Involuntary Departure: Client discharged from program/unit. Reasons may include disagreement with rules, prolonged refusal to engage, disruptive behaviour, damages to room or building, non-payment of rent, etc. This can include returns to homelessness. **Moved to another Unit in Program**: Client has moved to another unit available in the permanent supportive housing program. **Other:** Client has left housing for a reason not listed. **Voluntary Departure/Move:** Client has chosen to leave the program, unit, or address where they were living. This can include returns to homelessness.
If No, Date Left Housing	Level 3 – Situationally Required	Will only appear if the client was identified as no longer housed at the address. Enter the date the client/ left the address they were placed in.
If No, Is Housed Elsewhere	Level 3 – Situationally Required	Will only appear if the client was identified as no longer housed at the address. Leave as “No” if the client is now unhoused or if their housing status is unknown. Toggle to “Yes” if the client has already moved to a new address and is permanently housed. If housed elsewhere, you should add a Housing History record to note the client’s new address information. See the How to add Housing History for instructions.
Unit Now Available	Level 3 – Situationally Required	Toggle to “Yes”
Comments	Optional	Optional to add additional information about the viewing

Housing Placements for Family Shelter / Hotel Programs

Introduction

The Housing Placement module has been made available to Emergency Shelter and Hotel locations that serve families for the sole purpose of reducing data entry pressures on these service locations. Unlike housing history records that do not allow you to add family members to the record, housing placement records do allow you to add all family members. If a family is large, creating one housing placement record is arguably more efficient than creating individual housing history records for each family member. However, note that the housing placement module includes more steps and requires more training than the use of the housing history module.

Emergency Shelter and Hotel Locations serving families are not expected to provide the full suite of housing search and retention supports that the housing placement module was designed to record and track. Like other Emergency Shelter locations, they are expected to provide case management supports that are in alignment with the Housing-Focused Case Management Policy – Shelters.

When to open a housing placement record: At discharge and if the following criteria is met. A housing placement record for a family should only be created by an Emergency Shelter or Hotel location serving families if the following criteria is met:

- the family is not working with a RRH or ICM program and,
- the family is large and it is determined that it would be more efficient and less burdensome on staff to use the housing placement module instead of creating housing history records for each individual family member.

If the above criteria is met, create the housing placement record when the family is being discharged and moving into housing, not before.

When to close a case: At discharge. Close the housing placement record during the discharge process by adding a final follow-up. Shelter / hotel staff are not expected to provide community-based housing retention supports to the family once they have been discharged. If a family receives housing retention supports through a Shelter-Based Prevention and Diversion program, that service information should be tracked outside of HIFIS.

How to document housing information for a family

Step 1: Open a Housing Placement Record for Family

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Housing → Housing Placements**
2. Select the **Add Housing Placement** button Add Housing Placement
3. Fill in all required fields as per the data entry requirements below.
4. Click **Start Housing Placement** when done.

From the Client File:

1. Go to the family head's profile page.
2. Go to **Client Management → Housing Placements**
3. Select the **Add Housing Placement** button Add Housing Placement
4. Fill in all required fields as per the data entry requirements below.
5. Click **Start Housing Placement** when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name	Level 1 - Required	Will only appear when creating the housing placement through the Front Desk. Search for the family head in the field search function. A separate family members field will appear.
Family Members	Level 3 – Situationally Required	The list of family members will pre-populate. Add all family members to the housing placement by using the plus symbol for this field.

Caseworker	Level 1 - Required	Will pre-populate to the user creating the record. The caseworker could also be the designated case manager who supported the family while staying in an Emergency Shelter / Hotel, if applicable.
Housing Type(s) Sought	Level 2 - Required	Select the type(s) of housing that the family is moving into: • **Home Ownership:** Client is seeking a house/unit that they will own. • **Housed in Family's House / Apartment:** Client is seeking to be stably housed in a family's residence and not paying rent to a private/public landlord. Different from couch surfing. • **Lodging House:** Client is seeking housing in a licensed lodging house. Typically, lodging houses offer private rooms without on-site access to kitchen facilities. • **Rental at Market Price:** Client is seeking housing in a private market rental unit. • **Rental at Market Price with Rent Subsidy:** Client is seeking housing in a private market rental unit with a monthly rent supplement benefit/payment. • **Residential Care Facility:** Client is seeking housing in a Residential Care Facility offering communal living to people who require assistance with daily activities in life. This includes group homes. • **Single Room Occupancy:** Client is seeking housing in a private market rental unit that is a shared dwelling with rooms leased individually. • **Social/Community Housing:** Client is seeking housing in a social/community housing unit including rent-geared to income units.

		• **Supportive Housing:** Client is seeking housing in an affordable permanent supportive housing unit offering coordinated wrap around services and supports to tenants.
Search Started Date	Level 1 - Required	Enter the housing placement start date. This can be the same date that the family is being discharged and moving into housing.
Target Date	Do not use	Not applicable
Program	Level 1 - Required	Select “Emergency Shelter Supports”

Step 2: Provide Housing Details (Secure Housing)

Procedure:

1. Go to the family head’s profile page.
2. Go to **Client Management → Housing Placements**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon under the Action column.
4. Once in the **Housing Placement Details – Housing Not Secured** page, click the **Add and secure a housing unit** button Add and secure a housing unit to add a unit.
5. Fill in all required fields as per the data entry requirements below.
6. Press **Save** when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

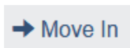
FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Housing Type	Level 1 - Required	Select the type(s) of housing that the family is moving into from the options listed: • **Home Ownership:** Client has secured a house/unit that they will own. • **Housed in Family’s House / Apartment:** Client has secured a space in a family’s residence and not paying rent

		to a private/public landlord. Different from couch surfing. • **Lodging House:** Client has secured a unit in a licensed lodging house. Typically, lodging houses offer private rooms without on-site access to kitchen facilities. • **Rental at Market Price:** Client has secured housing in a private market rental unit. • **Rental at Market Price with Rent Subsidy:** Client has secured housing in a private market rental unit with a monthly rent supplement benefit/payment. • **Residential Care Facility:** Client has secured housing in a Residential Care Facility offering communal living to people who require assistance with daily activities in life. This includes group homes. • **Single Room Occupancy:** Client has secured housing in a private market rental unit that is a shared dwelling with rooms leased individually. • **Social/Community Housing:** Client has secured housing in a social/community housing unit including rent-geared to income units. • **Supportive Housing:** PSH units that are not city-funded. Client has secured housing in a non-city funded affordable permanent supportive housing unit offering coordinated wrap around services and supports to tenants.
Status	Level 1 - Required	Enter the condition of the unit. Select the appropriate value from the options listed. • Excellent • Good

		• Fair • Poor / Substandard • In Need of Repair • Not Suitable for Housing
Status Date	Level 1 - Required	Enter the date that the family is being discharged and moving into housing.
Place Name	Optional	Optional to enter the place/building name here, if applicable (e.g., Queens Place Residence)
Address Line 1	Level 1 - Required	Enter the street address here (e.g., 123 Hamilton Avenue)
Address Line 2	Optional	Optional to enter a second address line here, if applicable
Unit/Apartment Number	Level 3 – Situationally Required	When applicable, enter unit/apartment number (e.g., unit # 101)
Country	Level 1 - Required	Select the appropriate value from the options listed.
City (international)	Level 3 – Situationally Required	Will only appear if a Country other than Canada is selected. If the family is moving out of the country, enter the name of the international town/city the client is moving to
Postal Code (international)	Optional	Will only appear if a Country other than Canada is selected. If the family is moving out of the country, optional to enter the international postal code/zip code here
Province/Territory/State	Level 3 – Situationally Required	Will only appear if a Country other than Canada is selected. If the family is moving out of the country, optional to enter the international province/territory/state here.
Province/Territory	Level 1 - Required	Select the appropriate value from options listed. Can type “Ontario”
City	Level 1 - Required	Select the appropriate value from options listed. Can type “Hamilton”
Postal Code	Level 2 - Required	Enter the postal code here
Expected Move In Date	Level 2 - Required	Enter the date that the family is being discharged and moving into housing.

Step 3: Complete Move-In Process (Move-In)

Procedure:

1. Go to the family head's profile page.
2. Go to **Client Management → Housing Placements,**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon  under the Action column.
4. Once in the **Housing Placement Details – Housing Secured** page, click the **Move In** button 

5. Fill in all required fields as per the data entry requirements below.
6. Click the **Move In** button when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Active Housing End Date	Level 1 - Required	Will only appear if the family has an active housing history record. Enter an end date for the previous housing. If the family has shared the specific or approximate date their previous housing has ended, please enter it. If the previous housing end date is unknown, please enter a date that is one-day prior to the move in date". If HIFIS does not allow you to end the previous housing record, please contact HIFIS@hamilton.ca.
Rent	Optional	Optional to enter the total monthly market rent amount.
Move In Date	Level 1 - Required	Enter the date the family is being discharged and moving into housing. Will auto-populate to current date and time but can be manually updated.
Use Exact Follow-up Date	Do not use	Not applicable
Months Until Follow-up	Do not use	Not applicable

Step 4: Close the Housing Placement Record for Family

Procedure:

1. Go to the family head's profile page.
2. Go to **Client Management → Housing Placements.**
3. In the **Housing Placement List** page, locate the housing placement record that you want to modify and click the **Manage** icon ⚙ under the Action column.
4. Once in the **Housing Placement Details – Moved Into Housing** page, under the **Follow-Ups** tab, click the **Add Follow-Up** button ⊕ Add Follow-up
5. Toggle **"Final Follow-up"** to "Yes" and fill in all required fields as per the data entry requirements below.
6. Press the **Save** button when done. **Note: The Housing Placement End Date and Time is automatically set to the moment you press "Save" and cannot be changed or edited.**

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Follow Up Date	Level 1 - Required	Enter the date the date the family is being discharged and moving into housing. Will auto-populate to current date and time but can be manually updated.
Months Elapsed	Do not use	Not applicable
Final Follow-Up	Level 3 – Situationally Required	Toggle to "Yes" Toggling to yes will end the entire housing placement.
All Clients Still in Housing	Level 1 - Required	Select "Yes – Still Housed at Address". The Final Follow-Up field will automatically change to "Yes". Proceeding will end the housing placement for this client/individual at this address.
Comments	Optional	Optional to add additional information about the move in.

VI-SPDAT

Procedures included in this section:	How to create a VI-SPDAT
Programs required to record VI-SPDATs	Drop-In Programs, Housing Focused Street Outreach, Emergency Shelters, and Hotels

The Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT) is Hamilton's Homeless-serving system's standardized triage tool. There is a different tool for single adults, youth, and families. In Hamilton, we are currently using the following tools:

- Version 3.0 – VI-SPDAT for Single Adults (Canadian)
- Version 3.0 – VI-SPDAT for Families (Canadian)
- Version 2.0 – VI-SPDAT for Transitioned Aged Youth (TAY) (Canadian)

New clients created in HIFIS should have their service needs assessed to connect them to the right range of supports. The VI-SPDAT is the selected tool for doing this, but there are exceptions for its use – Indigenous clients are not required to complete a VI-SPDAT.

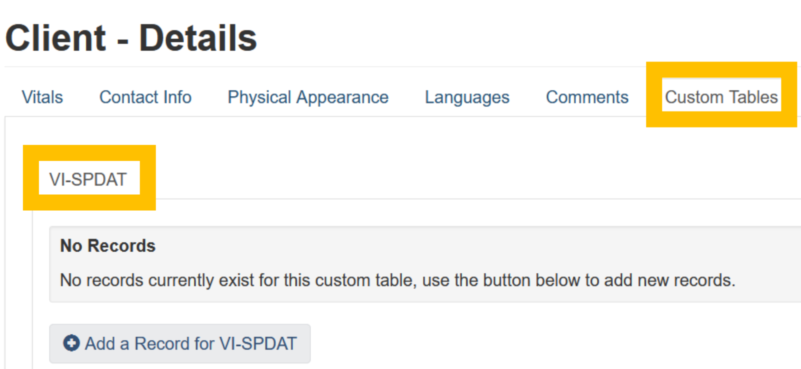
More information on the VI-SPDAT can be found on the City of Hamilton website.

For locations serving families, record the VI-SPDAT information in the client profile for the family head (as identified in HIFIS). You do not need to record the VI-SPDAT information in each family member's profile.

How to create a VI-SPDAT

Procedure:

1. Go to the client's profile page.
2. Go to the VI-SPDAT tab by clicking on **Client Information** à **Client Details** and select the **Custom Tables** tab and then the **VI-SPDAT** tab.



3. Click the **Add a Record for VI-SPDAT** button.
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
VI-Type	Level 1 - Required	There is a different VI-SPDAT tool that should be used when assessing the needs of single adults, youth, and families. Select the tool used and completed from the options listed: • Single Adults • Family • Youth
Score	Level 1 - Required	Enter the numeric total score from the VI-SPDAT 3. This should be the score recorded on the last page of the VI-SPDAT 3.
Date Completed	Level 1 - Required	Enter the date the VI-SPDAT 3 tool was completed with the client
Number of months homeless (past 3 years)	Level 1 - Required	Enter the number of months the client has reported being homeless over the last three years. This should be the total value from the **Housing History** section of the VI-SPDAT 3. The Question number on the tool varies by tool type. **Question:** *Thinking about those last three years and the different times you (and your family) were homeless… if you add up all the months you were homeless, what is the total length of time you have experienced homelessness?*
Housing Preference	Do not use	Do not Use

SPDAT

Procedures included in this section:	How to create a SPDAT
Programs required to use the SPDAT module	Transitional Living Programs, Rapid-Rehousing Programs, Intensive Case Management Programs, Permanent Supportive Housing Programs

The Service Prioritization Decision Assistance Tool (SPDAT) is Hamilton's Homeless-serving system's standardized tool used by housing programs. The SPDAT is an assessment tool used by trained housing program case managers to help guide housing placement and stability plans with an individual or family throughout their service. There is a different tool for single adults, youth, and families. In Hamilton, we are currently using the following tools:

- Version 5.0 – SPDAT for Single Adults
- Version 3.0 – SPDAT for Families
- Version 2.0 – SPDAT for Youth

The SPDAT is the selected tool to be used by trained housing program case managers to help guide housing plans and stability with an individual or family, but there are exceptions for its use – Indigenous clients are not required to complete SPDATs. Housing Services continues to work with partners to ensure pathways are culturally safe and accessible to Indigenous clients.

More information on the SPDAT can be found on the City of Hamilton website.

For locations serving families, record the SPDAT information in the client profile for the family head (as identified in HIFIS). You do not need to record the SPDAT information in each family member's profile.

The text/descriptions provided for each section in HIFIS are meant to be tips for completing the tool but could have changed in the latest version. It is recommended that case managers follow the guidance in the latest SPDAT workbooks and materials found on the City of Hamilton website.

Without going into the SPDAT and viewing the Progress Panel, there is no easy way to know if a SPDAT is completed. Please ensure you complete your SPDATs.

There is currently a bug with this module that causes fields that are not part of the SPDAT form to display including: Pre-Screen Period, Identifies as LGBTQ2S+, and Pet(s)?. For the mandatory "Pre-Screen Period" field, select the option "First".

How to create a SPDAT

There are two ways to access the SPDAT module:

- From the Front Desk
- From the Client's Profile

Procedure:

From the Front Desk:

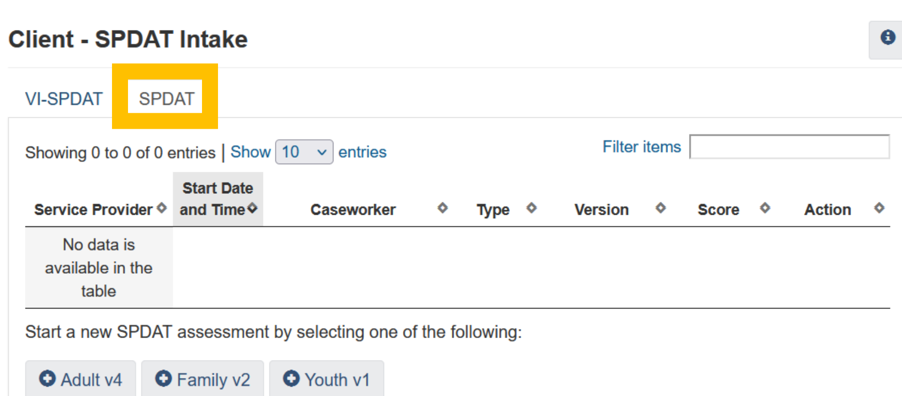
1. From the Front Desk menu, select **Assessments,** then **SPDAT.**
2. Select the appropriate **SPDAT type** using the buttons available. The current versions of the SPDATs in use in Hamilton are newer than what is available in HIFIS to use. Data entry guidance is as follows:

Currently in use in Hamilton (hard copy)	**Guidance for HIFIS Data Entry**
Single Adults – Adult v5	Enter using **Adult v4** button Adult v4
Family – v3	Enter using **Family v2** button Family v2
Youth – v2	Enter using **Youth v1** button Youth v1

3. Fill in all required fields as per the data entry requirements below.
4. Click **Save** when you are done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management** → **SPDAT.**
3. Go to the **SPDAT** tab.



4. Select the appropriate **SPDAT type** using the buttons available. The current versions of the SPDATs in use in Hamilton are newer than what is available in HIFIS to use. Data entry guidance is as follows:

Currently in use in Hamilton (hard copy)	**Guidance for HIFIS Data Entry**
Single Adults – Adult v5	Enter using **Adult v4** button Adult v4
Family – v3	Enter using **Family v2** button Family v2
Youth – v2	Enter using **Youth v1** button Youth v1

5. Fill in all required fields as per the data entry requirements below.
6. Click **Save** when done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name	Level 1 - Required	Will only appear when creating the SPDAT through the Front Desk. Search for the client that the SPDAT is being completed for in the field search function. Family Sector should search for the Family Head.
Caseworker	Level 1 - Required	Search and select the case manager that worked with the client to complete the SPDAT tool.
Start Date and Time	Level 1 - Required	The SPDAT can take multiple meetings to complete. Enter the date and time the SPDAT was started with the client. Will auto-populate to current date and time but can be manually updated. If the SPDAT has been completed by paper and is being entered into HIFIS afterwards, enter the date the SPDAT was completed in this field.
Assessment Period	Level 1 - Required	Select the appropriate value from the options listed: • **1st Assessment:** select if this is the first SPDAT required during

		the program intake process with the client. • **Move In:** select if this is the SPDAT required at the time the client moves into housing. • **30 Day Scores:** select if this is the SPDAT required at 30 days after the client has moved into housing. • **90 Day Scores:** select if this is the SPDAT required on or about 90 days after the client moved into housing. • **180 Day Scores:** select if this is the SPDAT required 180 days after the client moved into housing. • **270 Day Scores:** select if this is the SPDAT required 270 days after the client moved into housing. • **365 Day Scores:** select if this is the SPDAT required 365 days after the client moved into housing. • **Re-Housing:** select if this is the SPDAT required when the client has been re-housed. • **Significant Shift in Case Plan:** select if SPDAT has been completed because there has been a significant change impacting the client/families' housing plan. • **After the one-year mark?:** select if the client is still being supported beyond 365 days and a SPDAT has been completed. Can be used multiple times as supports continue.
Consent	Do not use	Do not use. Leave as "No"
Identifies as LGBTQ2S+	Do not use	Do not use. Leave as "No"
Pet(s)	Do not use	Do not use. Leave as "No"
Program	Level 1 - Required	Select the appropriate program/service that the individual accessed. For single service programs, the program field will pre-populate to the appropriate value. For programs that use the SPDAT module to record supports for multiple programs, select the appropriate value.

Description	Optional	Optional to add a general description or comments relevant to the SPDAT completed

7. Once the general information for the SPDAT has been filled out, proceed with completing each section (Section A to O) by adding a score for each section and a description or comments, if applicable.

Turn Aways

Procedures included in this section:	How to create a Turn Away
Programs required to use the Turn Aways module:	Emergency Shelters and Hotels Programs also approved to use the module on an optional and limited basis and are still required to follow the guidance and procedures outlined below are: Drop-In Programs, Shelter-Based Diversion programs.

The Turn Aways module in HIFIS is used to record information about a client or family who were turned away from a particular service – primarily an emergency shelter location. It includes information about the reason they were turned away, the date and time it took place, and if they were referred from or to another shelter/program for services.

Emergency Shelter Program Turn Aways can include:

- Direct inquiries from individuals/families seeking emergency shelter.
- Direct inquiries from individuals/families seeking to relocate from one emergency shelter to another (including a Domestic Violence Shelter).
- Inquiries and referrals made by staff on behalf of unsheltered individuals/families seeking emergency shelter from another program or shelter location that cannot provide them with services because they are full. In these scenario's, the referral source is required.

Drop-In Program Turn Aways can include:

- Individuals presenting in-person who had to be turned away for an eligible reason.
- Inquiries and referrals made by staff on behalf of eligible unsheltered individuals/families regarding space availability at the Drop-In location and were told that no space was available.

Turnaways can be recorded in the client profile of individuals who exist in HIFIS as well as anonymously for individuals/families who have not consented to be in HIFIS.

There are two ways to add a record in the Turn Aways module:

1) From the Front Desk
2) From the Client's Profile

Staff are required to ask individuals some diversion screening questions and to collect some basic information to:

- **identify if the individual has an existing profile in HIFIS.**
- **ensure the most appropriate turn away reason is identified and recorded** (i.e., current housing situation, gender, age, etc.)

- ○ **ensure the referral source is identified and recorded** (i.e., HFSO, another shelter location, health services, etc.).

Given the volume of inquiries that emergency shelters receive, the priority data collection is recording "No Beds Available" turn aways for individuals/families screened and determined as eligible for space.

Individuals / families should not be asked to sign consent to be added to HIFIS for the sole purpose of recording a turn away.

For locations serving families, record the Turn Aways information in the client profile for the family head (as identified in HIFIS) but also include the family members using the **Family Members** field.

For individuals being turned away with an existing profile in HIFIS, they turn away should be recorded in their profile and not as an anonymous turn away.

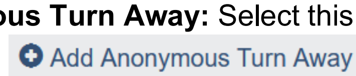
When recording Anonymous Turn Aways, always use the "**Add Anonymous Turn Away**" button. Do not use the "Add Turn Away" button intended for unique clients in HIFIS. Using the correct option ensures the Turn Away is recorded properly for reporting purposes.

How to create a Turn Away

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Turn Aways.**
2. Select one of the following based on the following guidance:
   - **Add Turn Away:** Select this option if the client has a profile in HIFIS 

   - **Add Anonymous Turn Away:** Select this option if the client does not have a profile in HIFIS 

3. Fill in all required fields as per the data entry requirements below.
4. Click **Save** when you are done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Turn Aways**

3. Select **Add Turn Away** button 

4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the [Field Level Data Entry Requirements]() section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name	Level 1 - Required	Will only appear when you select “Add Turn Away” through the Front Desk. Search for the client that was turned away from receiving services in the field search function. Locations serving families should search for and select the Family Head.
Family Members	Level 3 – Situationally Required	Will only appear when creating a turn away for a client that has family members that exists in HIFIS. The list of family members will pre-populate. Add all family members to the turn away by using the plus symbol for this field.
Age Group	Level 1 - Required	Will only appear when you select “Add Anonymous Turn Away” through the Front Desk. Select the appropriate value from the options listed: • Youth • Adults • Seniors • All Ages Locations serving families should select “All Ages” if the age of family members seeking services varies.
Gender	Level 1 - Required	Will only appear when you select “Add Anonymous Turn Away” through the Front Desk. Select “Unknown” for all anonymous turn aways.

Effective Date and Time	Level 1 - Required	Enter the date and time the turn away took place. Will auto-populate to current date and time but can be manually updated.
Number of Adults	Level 1 - Required	Will auto-populate to "1" and will not update as family members are added. Manually adjust as needed, including if adult family members who are in HIFIS are added to the turn away.
Number of Children	Level 1 - Required	Will auto-populate to "0" and will not update as family members are added. Manually adjust as needed, including if children/youth family members who are in HIFIS are added to the turn away.
Reason for Service	Level 2 - Required	Select the reason the client is seeking an emergency shelter stay or services at a Drop-In program. The reason for service may differ for each visit the client has. Select the appropriate value from the options listed: • **Child Accompanying a Parent/Guardian:** The client is accessing services with family. • **Group Activity:** DO NOT USE FOR TURNAWAYS. • **Housing Loss – Conflict or Relationship breakdown:** Client had to leave housing because of a conflict or breakdown in a relationship with an individual(s) who resides there. This could be either friends or family members. • **Housing Loss – Eviction:** Client had to leave housing because they were provided with a Notice of Eviction under the Residential Tenancies Act • **Housing Loss – Financial:** Client had to leave housing because they could no longer afford to live there. • **Housing Loss – Personal Safety:** Client had to leave housing because of personal safety concerns. • **Housing Loss – Unsuitable Living Conditions:** Client had to leave housing because the status

		of the dwelling was poor and unsuitable to live in. For example, there was a fire, flood, no access to running water, unable to access unit due to mobility needs, etc. • **Housing Stability:** Client is currently housed and is accessing services as a housing loss prevention support. • **Information Not Collected:** For drop-ins and HFSO only. Used to identify that the client was not asked about the reason they were accessing supports. • **Newcomer – Asylum Claimant**: Client recently arrived in Canada, is seeking refugee protection, and does not have housing yet. • **Newcomer – Non-Asylum Claimant:** Client recently arrived in Canada, is not seeking refugee protection, and does not housing yet. • **Other:** Client requesting service for a reason not listed. • **Recently Discharged from Institution:** Client was recently discharged from an institution such as a hospital, corrections/jail, withdrawal management program, or recovery/treatment program. • **Unsheltered – Transient Lifestyle:** Client is unsheltered and requires sporadic access to service.
Reason for Turn Away	Level 1 - Required	Select the appropriate value from the options listed: • **Active Service Restriction:** The client is currently restricted from accessing services at the location and was turned away. This includes if the client has a Court Order/No Trespass order active that prohibits them from accessing an emergency shelter site and issued by a court or Hamilton Police Services. • **Ineligible for Service – Eligibility Unverifiable:** The individual could

		or would not provide verification of their eligibility for services at the location. • **Ineligible for Service – Gender:** The individual did not identify with the gender target population served at the location. • **Ineligible for Service – Has Housing:** Applicable to Emergency Shelters and Hotels only. Client has been identified as having alternative housing options available to them and does not qualify for Emergency Shelter supports. • **Ineligible for Service – Other:** The individual was identified as not being aligned in a way other than having housing, gender and age with the target population served at the location. • **Ineligible for Service – Too Old:** The individual was older than the target population served at the location. • **Ineligible for Service – Too Young:** The individual was younger than the target population served at the location. • **No Bed Available:** For City-funded Emergency Shelters and Hotel locations only. Client has no other housing available and was turned away because there were no beds/rooms available. • **Physical Accessibility:** The Client has a physical / medical accessibility need that requires accommodations that are not available on site (i.e., elevator). • **Program Full – Drop-In:** Applicable to Drop-Ins only. The individual was turned away because the program was full at the time they tried to access it. • **Under the Influence:** For programs that focus on supporting individuals with their substance use only. The individual was presumed to be under the

		influence of drugs and alcohol and not in a state appropriate for accessing services. • **Diversion Successful:** For Emergency Shelters only and optional to use. The client seeking services was successfully diverted and did not require emergency shelter.
Requested by	Level 1 - Required	Search for and select the staff person who completed the turnaway using the field search function.
Referred from	Level 1 - Required	It is required to note if the client was referred for services at your location by another service provider or if it is a self-referral. Priority data entry is to note referrals from the Housing Focused Street Outreach team (HFSO) and domestic violence shelters in Hamilton. Options listed are grouped based on the place type or if it is a self-referral: **Client / Self:** Client has self-selected to request admission to an emergency shelter / hotel location and was not referred by other service providers. **Another Shelter:** • **Emergency Homeless Shelter:** Client was referred from/to another city-funded Emergency Homeless Shelter program in the City of Hamilton • **Emergency VAW Shelter:** Client was referred from/to a VAW / Domestic Violence emergency shelter program. • **Overflow / Hotel:** Client was referred from/to the overflow / hotel emergency shelter program in the City of Hamilton **Health Services:** • **Health / Mental Health Services:** Client was referred from/to a public health or community-based mental health program (i.e., Hamilton Public Health mental

		health programs including Street Outreach and IntAC, CMHA, agency-based clinical programs, etc. • **Hospital:** Client was referred from/to a hospital or hospital-based program (i.e., St. Joseph's Healthcare programs, Hamilton General Hospital programs, Juravinski programs, Hamilton Health Sciences, etc. **Housing Services:** • **City Housing:** Client was referred from/to CityHousing. • **Social Housing (City of Hamilton):** Client was referred from/to the Social Housing team. • **Supportive Housing Program:** Client was referred from/to a Permanent Supportive Housing Program. **Legal / Mediation Services:** • **Legal / Mediation Services:** Client was referred from/to a program that specializes in providing legal / mediation services and support. **Police Services:** • **Police Services:** Client was referred from staff in police services. **Settlement Services:** • **Newcomer Settlement Services:** Client was referred from/to a program that specializes in providing supports to newcomers. **Community Services:** • **Cultural Services:** Client was referred from/to a program that is faith, ethnicity, culturally based, etc. • **Public Library:** Client was referred from staff at a Hamilton Public Library branch.

		Social Services – Community-Based: • **Child & Youth Services:** Client was referred from/to a program that specializes in providing supports to children and youth. • **Educational Services:** Client was referred from/to a program that specializes in providing education services and supports. • **Employment Services:** Client was referred from/to a program that specializes in providing employment services and supports. • **Income Assistance:** Client was referred from/to OW, ODSP, tax clinic, etc. • **Recreational Services:** Client was referred from a staff at a Hamilton Recreation Centre or other Recreation program. **Indigenous Service Provider:** • **Indigenous Service Provider:** Select for all programming provided by Indigenous community partners (i.e., CHIL, HRIC) **Homelessness Services:** • **Diversion Program:** Client was referred from/to a Diversion program in the City of Hamilton • **Drop-In Program:** Client was referred from/to a Drop-In program in the City of Hamilton • **Early Intervention Supports Pilot:** Client was referred from/to an early intervention supports pilot program in the City of Hamilton • **Housing Focused Street Outreach:** Client was referred from/to the Housing Services Division Housing Focused Street Outreach team in the City of Hamilton • **ICM Program:** Client was referred from/to an Intensive Case Management (ICM) program in the City of Hamilton

		• **Prevention Program:** Client was referred from/to a Prevention program in the City of Hamilton • **RRH Program:** Client was referred from/to a Rapid Rehousing (RRH) program in the City of Hamilton • **TLP Program:** Client was referred from/to a Transitional Living (TLP) program in the City of Hamilton **Other:** • **Other:** Client was referred from a source not listed.
Referred to	Optional	Optional to select which service the client was referred to – if applicable. The list of options is the same as the previous **“Referred from”** field.
Comments	Optional	Optional to add comments relevant to the turn away.

Incidents

Procedures included in this section:	How to create an Incident
Programs required to use the Incidents module	Emergency Shelters and Hotels Programs also approved to use the module on an optional basis and are still required to follow the guidance and procedures outlined below are: Drop Ins and Transitional Living Programs

The Incidents module in HIFIS is used to record incidents that resulted in a postponement period / warning or partial service restriction for a client. Numerous postponement periods / warning or partial restrictions can lead to a Level 1 or 2 Service Restriction. Programs are only required to capture information on incidents if a Level 1 or 2 Service Restriction is being issued. They can be entered in HIFIS at the same time the service restriction information is being entered.

For more information on incidents and service restrictions, please review the City of Hamilton's Service Restriction Policy for Emergency Shelters.

There are two ways to add a record in the Incidents module:

- From the Front Desk
- From the Client's Profile

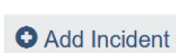
For locations serving families, record the Incident information in the client profile for the family head (as identified in HIFIS). You do not need to record the incident information in each family member's profile.

There is currently a bug with this module that causes unnecessary fields to display. Please ignore the following fields: Charges Laid, Police Badge, Police Report, Number.

How to create an Incident

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Incidents.**
2. Select **Add Incident** 

3. Fill in all required fields as per the data entry requirements below.
4. Click **Save** when you are done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Incidents.**
3. There are two buttons available. Select **Add Incident As Involved**
   Add Incident As Involved
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Involved	Level 1 - Required	Search for and select the client(s) that were involved using the field search function. Option to add more than one person.
Witnesses	Do not use	Do not use
Emergency Services	Level 3 – Situationally Required	If emergency services were called for support to address the incident, please identify which service(s) were contacted. Option to add more than one emergency service: • Animal Services • Fire Dept • Good Shepherd Barrett Centre • Paramedics • Police • Crisis Outreach and Support Team (COAST) • Mobile Crisis Rapid Response Team (MCRRT) • Rapid Intervention Support Team (RIST) • Social Navigator Program (SNP) • Other
Nature of Incident	Level 1 - Required	The options listed are in alignment with the reasons and categories for service restrictions defined in the Service Restriction policy for Emergency Shelters and Hotels.

		Select the appropriate value from the options listed. • **Disruptive Behaviour:** Breaching Client Rights and Responsibilities expectations in a manner which significantly interferes with staff's ability to maintain operations. This may include: Being persistently uncooperative and argumentative, interfering with the ability of others to sleep or access services, Vandalism/damage to property, refusing to leave when asked. • **Illegal Activity:** Illegal activities affecting the operations, safety, wellbeing, or property of others, including but not limited to: Violating Ontario Fire Code or Smoke Free Ontario Act (e.g. smoking inside program, tampering with a fire alarm), Arson, Selling drugs on property, Theft or stealing in the building, Deliberate and serious property damage, Breaking into locked or prohibited areas of the shelter. • **Non-compliance with Rules/Regulations:** Failure to follow agency rules or regulations, such as: Name calling/bullying including racism, sexism, or any discriminatory language, Refusal to follow health and safety regulations. • **Prolonged Refusal to Engage:** Refusal to engage with staff as required in the Client Rights and Responsibilities to discuss or work towards housing goals for more than 60 days. • **Safety/Security Risk:** Behaviours or activities which put the safety and security of other clients, guests, and/or staff at risk, such as: Threatening others, Physical violence, Deliberate and ongoing harassment of clients or staff.

Date and Time	Level 1 - Required	Enter the date and time the incident occurred. Will auto-populate to current date and time but can be manually updated.
Location	Level 1 - Required	Enter high level details on the location of the incident. For example, Lobby, Rooms/Dorms, Bathrooms, Outside in Parking lot, etc.
Comments	Do not use	Do not use

Service Restrictions

Procedures included in this section:	How to create a Service Restriction
Programs required to use the Service Restrictions module	Emergency Shelters and Hotels Programs also approved to use the module on an optional basis and are still required to follow the guidance and procedures outlined below are: Drop Ins and Transitional Living Programs

The Service Restrictions module in HIFIS is used to record information about service restrictions in place for an individual, including the reason for the service restriction, start and end dates, and the service provider it is with. For more information on service restrictions, please review the City of Hamilton's Service Restriction Policy for Emergency Shelters.

Service Restrictions and notes are not automatically accessible to everyone who has access to HIFIS. Based on your role and position within your organization, you may or may not be able to view the details of a Service Restriction.

For locations serving families, record the Service Restriction information in the client profile for the family head (as identified in HIFIS). You do not need to record the service restriction information in each family member's profile.

Level 4 Service Restrictions require reporting within 24 hours to Housing Services Division at the City of Hamilton.

There are two ways to add a record in the Service Restrictions module:

1) From the Front Desk
2) From the Client's Profile

How to create a Service Restriction

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Service Restrictions.**
2. Select **Add Service Restriction.**
3. Fill in all required fields as per the data entry requirements below.
4. Click **Save** when you are done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Service Restrictions.**
3. Select **Add Service Restriction.**
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name	Level 1 - Required	Will only appear when creating the service restriction through the Front Desk. Search for the client that is being restricted from receiving services in the field search function. Family Sector should search for and select the Family Head.
Requested By	Level 1 - Required	This is an open text field. Enter the name of the appropriate staff member or supervisor/manager based on the following guidance: • For **Level 1 Restrictions,** search for and select the staff issuing the service restriction. • For **Level 2 to 4 Restrictions,** search for and select the direct supervisor or manager who authorized the service restriction. • For **Court Order/Trespass Restrictions,** search for and select the staff recording the service restriction. • For **Hotel Admin Restrictions,** search for and select the staff recording the service restriction.
Start Date and Time	Level 1 - Required	Enter the service restriction start date and time. Will auto-populate to current date and time but can be manually updated.
End Date and Time	Level 1 - Required	Enter the service restriction end date and time. Will auto-populate to current date and time but can be manually updated.

Service Providers	Level 1 - Required	Select the location the client is being restricted from accessing services. Do not select multiple locations for the same service restriction.
Modules	Level 1 - Required	Emergency Shelters should select: “**Admissions**”
Reason for Restriction	Level 1 - Required	Select the appropriate value from the options listed: • **Level 1 – 24 hours:** After three documented postponement periods/warnings or partial restrictions recorded in the Incidents module. First occurrence of: Selling drugs on property, Theft or stealing in the building; Repeated occurrences of: Being persistently uncooperative and argumentative, Violating Ontario Fire Code or Smoke Free Ontario Act (e.g. smoking inside program), Vandalism/damage to property, Name calling/bullying including racism, sexism, or any discriminatory language, Refusing to leave when asked – may involve police called to escort out. Occurrences that lead to a Level 1 Service Restriction should also have the required documentation in the Incidents Module as well. • **Level 2 – 1 to 4 days:** Second occurrence of a Level 1 Service Restriction; Repeated occurrence of: Selling drugs on property, Theft or stealing in the building as documented in the Incidents module. Occurrences that lead to a Level 2 Service Restriction should also have the required documentation in the Incidents Module as well. • **Level 3 – 1 to 60 days:** Serious events which compromise the safety of other clients, staff, and community: Physical violence or immediate threat of violence, Arson, Breaking into locked areas and resident rooms, Deliberate and ongoing harassment of clients

		or staff, Deliberate and serious property damage. • **Level 4 – 61 days or more:** Long-term service restrictions (over a period of three months) will only be issued in the most serious cases that compromise the safety and security of staff and clients. The Manager of Homelessness and Housing Supports or Supervisor of Emergency Shelter Services must be notified of any long-term service restrictions. Includes: Threat of physical harm/ threatening with a weapon, Violent behaviour/Physical assault of staff and clients, Fire setting/arson. • **Court Order/Trespass Order:** A court order or no trespass order which prohibits a client from accessing an emergency shelter site. Issued by a court or Hamilton Police Services. • **Hotel Admin Restriction:** Hotel staff decide to discharge a client due to behaviours which disrupt business operations, negatively affect other customers, failure to comply with hotel rules, or as otherwise deemed necessary by hotel management.
Comments	Level 1 - Required	Staff are required to enter detailed notes about the service restriction that include the following information listed below. • More information regarding the reason(s) for the restriction (i.e., disruptive behaviour, safety/security risk). • Alternatives pursued to prevent restriction including details of how staff attempted to avoid service restricting the client (e.g., de-escalation, partial restriction, case management meeting with client, etc.). • Date the client was notified of the restriction or attempt to notify client was made.

		• Shelter or other destination to which the client was referred, if applicable. • Confirmed authorization by supervisor or manager if the restriction exceeds 24 hours. • Details of the three warnings issued leading up to the service restriction being put in place (if it was safe and reasonable to issue warnings). • For 60+ day restrictions, details of the review results and extension (as applicable). • For appealed restrictions, details on the appeal findings and adjustments made. • If a Level 4, confirmation that Housing Services Division at the City of Hamilton have been contacted and notified. Staff are encouraged to use this list as a template to ensure their notes are completed in accordance with the service restriction policy.

6.0 Other Procedures

The following modules are available in the Client Information section of a client profile and have been identified as having operational benefits. These modules are optional for programs to use. If used, the guidance outlined below must be followed. Also, if used, it is recommended that programs implement a consistent practice across the whole program/team to ensure the information is complete and accurate for all clients.

Client Comments

Comments are a general place to add relevant information to a client profile that does not fit within other modules. HIFIS users also can reply directly to existing Comments.

The following are examples of unacceptable uses of Comments:

- To copy and paste information recorded in another place in the client profile, for example, a copy of a client's contact information, recent service restriction information, etc.
- To record personal or sensitive information about a client such as safety-related or health-related information.

Procedure:

To add a comment to a client profile, follow this procedure:

1. Go to the client's profile page.
2. Go to the **Comments** tab by clicking on **Client Information → Client Details** and select the **Comments** Tab.

3. Click the **Add Comment** button.
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when you are done.

Data Entry Requirements:

See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Subject	Level 1 - Required	Enter a brief subject/topic
Comments	Level 1 - Required	Enter a comment. Information added should not be a duplication of information recorded in specific modules, nor should it be personal or sensitive client information such as safety-related or health-related information.

Storage

Storage is a place to record information about belongings stored for clients. It is optional for programs to use.

Procedure:

From the Front Desk:

1. From the Front Desk menu, select **Storage.**
2. Select the **Add Storage Item** button Add Storage Item
3. Fill in all required fields as per the data entry requirements below.
4. Click **Save** when done.

From the Client File:

1. Go to the client's profile page.
2. Go to **Client Management → Storage.**
3. Select the **Add Storage Item** button Add Storage Item
4. Fill in all required fields as per the data entry requirements below.
5. Click **Save** when done.

Data Entry Requirements:

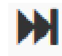
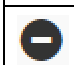
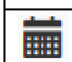
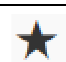
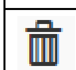
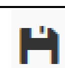
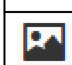
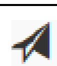
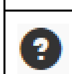
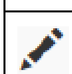
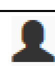
See the Field Level Data Entry Requirements section above for more information on the data entry Level requirements.

FIELD NAME	DATA ENTRY REQUIREMENTS	DATA ENTRY INFORMATION
Client Name	Level 1 - Required	Will only appear when creating the storage record through the Front Desk.

		Search for the client that have belongings in storage in the field search function. Family Sector should search for and select the Family Head.
Item	Level 1 - Required	Enter a brief description of the belongings being stored for the client.
Storage Location	Optional	Optional to add information about where the belongings are being stored.
Start Date	Level 1 - Required	Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD
End Date	Level 2 - Required	Use calendar to search for date to avoid data entry errors. Format: YYYY-MM-DD When belongings have been picked up or are no longer being stored, programs should end date the record.
Storage Outcome	Level 2 - Required	Select the appropriate value from the options listed: • Abandoned • Retrieved • Stolen • Other
Comments	Optional	Optional to add a general description or comments relevant to the belongings being stored.

Appendices

Appendix A: Common Icons in HIFIS

	Add		Express Book In
	Add Reservation		Filter
	Add Book In **or** Log In		Get Help
	Admissions		Layout
	Book Out		Manage
	Book Out Selected Clients		Next or Merge
	Calendar		Preview and End Export
	Cancel		Refresh
	Client has Active Watch Concern		Required Field
	Data Export **or** Information **or** Client Activity Log		Run Report
	Delete		Save
	Deselect All		Search
	Display		Select All
	Download		Send
	Enable Field Description		Time/Hour
	Edit **or** Fields **or** Table		User Account

[2]

[2] HIFIS Homeless Individuals and Families Information System User Guide Version 2.0 – Infrastructure Canada

Appendix B: Case Session Activity Options and Definitions

Session Type	Definition
1. Intake – Initial Contact	The first engagement with the client to offer supports and to start to build trust and rapport.
2. Intake – Needs Assessment	At the start of working with the client, any engagement that focuses on understanding their needs, issues, and concerns.
3. Intake – Goal Setting	At the start of working with the client, any engagement that focuses on setting goals and outcomes with the client. For example, goal setting may include discussions about an overall case plan, housing plan, and a budget.
4. Intake – Service Plan Completed	To note that the Service Plan (i.e., the housing plan) has been completed. The description for the session should summarize key components of the service plan.
5. Intake – PSH Support Plan Completed	For PSH programs only. To note that the Individualized Support Plan has been completed. The description for the session should include a summary of the key components of the support plan.
6. Meeting – Scheduled Check-In	Any in-person engagement with the client that is scheduled in advance and occurs on a routine basis such as weekly or monthly.
7. Meeting – Additional Client Interaction	Any in-person engagement with the client that is in addition to regular check-ins. For example, to discuss time-sensitive services that have come available, to coordinate new appointments, etc.
8. Meeting – Goal Progress Review	Any in-person engagement with the client that is focused on discussion progress towards the desired goals and outcomes. This also includes time spent completing the SPDAT tool as a measure of progress towards housing stability.
9. Phone Call/Email – Scheduled Check-In	Any phone call or email with the client that is scheduled in advance and occurs on a routine basis.
10. Phone Call/Email – Additional Client Interaction	Any phone call or email with the client that is in addition to regular check-ins. For example, to discuss time-sensitive services that have come available, to coordinate new appointments, etc.
11. Client No Show	To note that the client did not show for an in-person meeting with their case manager or for an appointment that the case manager was accompanying them. This option should not be used to note when clients miss appointments with other service

Session Type	Definition
	providers that the case manager was not also attending.
12. Contact Attempt	To note that the case manager attempted to contact the client. For example, phoning or emailing the client directly, contacting the Emergency Shelter the client is staying with, etc.
13. Accompanying Client to Appointments	Any engagement with the client that is dedicated to accompanying them to appointments.
14. Client Empowerment	Any engagement with the client that is dedicated to building their confidence and empowering them to voice their needs and concerns as it relates to services, housing, etc.
15. Housing Support – Housing Search Support	Any engagement that is dedicated to helping the client search for housing.
16. Housing Support – Application (Social Housing)	Any engagement that is dedicated to helping the client complete any required documentation or forms for the ATH Waitlist and Social Housing.
17. Housing Support – Application (TLP, PSH)	Any engagement that is dedicated to helping the client complete any required documentation or forms for a Transitional Living or Permanent Supportive Housing program.
18. Housing Support – Application (Private Market)	Any engagement that is dedicated to helping the client complete any required documentation or forms to rent a private-market house/unit/room.
19. Housing Support – Move In Support	Any engagement that is dedicated to helping the client move in successfully. For example, arranging to have their belongings moved to their new place, helping them find furniture, etc.
20. Housing Support – Landlord Negotiations	Any engagement that is dedicated to helping the client to communicate and resolve disputes with their landlord as needed. This may be directly with or on behalf of the client.
21. Housing Support – Mediation	Any engagement that is dedicated to helping the client to communicate and resolve disputes with their family, friends, or roommates as needed. This may be directly with or on behalf of the client.
22. Housing Support – Eviction Prevention	Any engagement that is dedicated to helping the client to avoid an eviction including being evicted from a city-funded PSH unit. This may be directly with or on behalf of the client.
23. Referrals and Liaising – Education Services	Any engagement that supports the client's access to a service or support program that specializes in education services and vocational services.
24. Referrals and Liaising – Employment Services	Any engagement that supports the client's access to a service or support program that specializes in employment and job services.

Session Type	Definition
25. Referrals and Liaising – Financial & Income Supports	Any engagement that supports the client's access to income supports and financial aid, such as Ontario Works, ODSP, CPP, OAS, and EI, as well as support submitting income tax forms.
26. Referrals and Liaising – Harm Reduction Services	Any engagement that supports the client's access to a service or support program that specializes in supporting harm reduction, including safe-injection sites, methadone clinics, HPH's needle van program, Urban Core and AIDS Network.
27. Referrals and Liaising – Social Housing Programs	Any engagement that supports the client's access to Access to Housing or CityHousing.
28. Referrals and Liaising – TLP	Any engagement that supports the client's access to a Transitional Living or Permanent Supportive Housing Program.
29. Referral and Liaising – PSH	Any engagement that supports the client's access to a Permanent Supportive Housing Program.
30. Referral and Liaising – RCF	Any engagement that supports the client's access to Residential Care Facility Program.
31. Referrals and Liaising – Landlords (Private Market)	Any engagement that supports the client's access to a private market rental including reaching out to landlords to inquire about the unit, advocating for the client, etc.
32. Referrals and Liaising – Indigenous Services	Any engagement that supports the client's access to a program that is primarily for individuals who are Indigenous, including Hamilton Regional Indian Centre (HRIC – Ottawa and King), Aboriginal Health Centre, Native Women's Centre, and the De dwa da dehs nye>s mobile medical clinic.
33. Referrals and Liaising – Legal Services	Any engagement that supports the client's access to a service or support program that specializes in legal services.
34. Referrals and Liaising – Mental Health Services	Any engagement that supports the client's access to a service or support program that specializes in supporting mental health, including Good Shepherd Barrett Centre, St. Joe's psychiatric emergency and schizophrenia programs, Mobile Crisis Rapid Response Team (MCRRT), Rapid Intervention Support Team (RIST), Crisis Outreach and Support Team (COAST), etc.
35. Referrals and Liaising – Newcomer Services	Any engagement that supports the client's access to a service or support program that specializes in services for Newcomers to Canada including Refuge Newcomer Health, etc.

Session Type	Definition
36. Referrals and Liaising – Other Supports	All other supports or referrals provided to clients who that does not fit within any of the other categories including referrals to ID clinics, food programs, laundry services, legal supports, schools, and advocacy for other supports.
37. Referrals and Liaising – Pet Services	Any engagement that supports the client's access to a service or support program that specializes in support for pets, including City of Hamilton Animal Services, and SPCA clinic referrals and requests for service.
38. Referrals and Liaising – Physical Health Services	Any engagement that supports the client's access to a service or support program that specializes in supporting physical health, including Hospital programs, De dwa da dehs nye>s mobile medical clinic, Good Shepherd Health on Wheels bus, Encampment Engagement Paramedics (EEP), Social Navigator Program (SNP), and calls to 911 / emergency services.
39. Referrals and Liaising – Prenatal/Parental Supports	Any engagement that supports the client's access to a service or support program that specializes in support for expecting or new parents.
40. Crisis Intervention – Emergency Assistance	Any engagement with the client that is focused on assisting them in an emergency. For example, supporting them during times when they are distressed, require urgent medical care, or require urgent mental health supports. Similar to watch concerns, please do not enter specific health or mental health related information for a client. You can note in general that the client did require crisis intervention supports because of a physical or mental health need, but do not enter the details of the event.
41. Crisis Intervention – Immediate Safety Planning	Any engagement with the client that is focused on assisting them to ensure they are safe and stay safe. For example, establishing or implementing a safety plan.
42. Crisis Intervention – Conflict Resolution	Any engagement with the client that is focused on de-escalating and resolving a conflict.
43. Emergency Response – Addressing Immediate Needs	Any engagement with the client that is focused on helping the client with their basic needs. For example, providing them with food, gift cards, clothing, menstrual supplies, etc.
44. Emergency Response – Crisis Counselling	Any engagement with the client that is focused on assisting them during a crisis. For example, supporting them during times when they are stressed, anxious, or require emotional support.

Session Type	Definition
45. Social Support – Connecting with Community Groups	Any engagement that supports the client's connection to community groups including faith, ethnicity, or culturally based, or volunteer groups.
46. Social Support – Building Social Networks	Any engagement that supports the client's connection to others in the community and to build their social support network.
47. Admin – Case Conference Notes	To note relevant housing-focused information shared by other service providers in case conferencing about the client.
48. Admin – Completing Forms	To note time spent by the case manager to complete forms specific to their program. Referral forms to other programs should be documented using one of the Referrals and Liaising options.
49. Admin – Updating Client Records	To note time spent by the case manager to update the client's information in HIFIS or agency database.
50. Admin – Case and Case Notes	To note time spent by the case manager to add overall case updates and detailed notes.
51. Admin – Primary Case Worker Transfer	To note that the primary case management has changed for the client. **For use by Emergency Shelter locations only.**

Appendix C: Frequently Asked Questions

How should staff in roles other than Case Managers (e.g., Landlord and Tenant Workers, System Navigators, Landlord Liaisons) record their work in HIFIS under ICM and RRH programs?

Staff in other funded roles within ICM and RRH programs should record their activities as Case Sessions under the Case Management record created by the client's Primary Case Manager.

How should families with two assigned Case Managers record their work:

If a family is assigned two Case Managers, each Case Manager should open their own Case Management record for the family and document their work separately.

To view all case activities for the family across both records, Case Managers can use the custom Case Session Report in HIFIS.

What should a program do if a family supported by RRH/ICM separates while their housing placement is still open?

If the family has not moved into housing yet:

1) End the current Housing Placement record
2) In the Family Module, end the enrolment of all applicable family members in the family unit. For couples/adult only families, make sure to add an end date for each individual to prevent someone being identified as a one-person family.
3) If applicable, create new Housing Placement records for any individuals still being supported.

If the family has already moved into housing:

4) Add a Follow-Up to the existing Housing Placement record. Identify which family members have left the housing. This will update their Housing Status. *(Note: The placement will still list those members in the "Family Members" field, but their record will show an end date.)*
5) In the Family Module, end the enrolment of all applicable family members in the family unit. For couples/adult only families, make sure to add an end date for each individual to prevent someone being identified as a one-person family.
6) If applicable, create new Housing Placement records for any individuals still being supported