



Case Management & Goods and Services

Use and Expectations

May 4, 2023



Introduction

- Case Management and Goods and Services are 2 key entries that keep clients active in HIFIS.
- These entries also assist in meeting the client where they are at.
- They assist us in understanding the supports the client has received.
- This session is meant to provide an overview of the expectations and use of the Goods and Services and Case Management section of HIFIS.



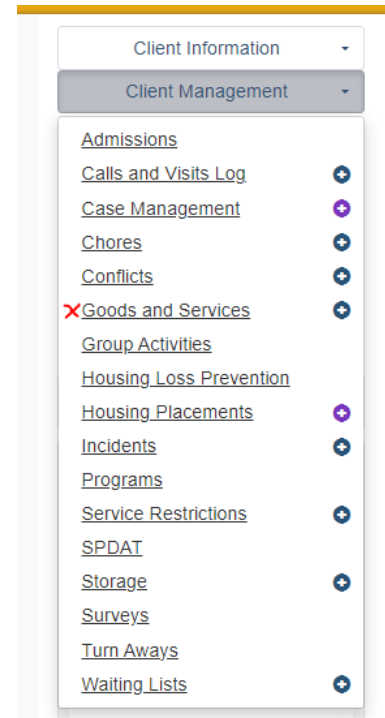
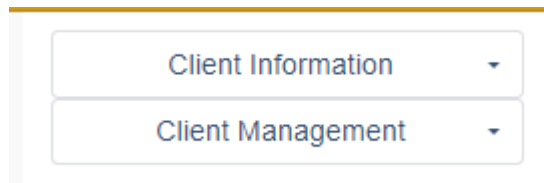
What's the Difference?

- What is the difference between a Goods and Service entry and a Case Management entry in HIFIS?
 - Goods and Services are a 'Good' provided to the client or 1 time 'Service' support (unsure or no plan to meet with the client to work towards Goals in the future).
 - Case Management is support you provide a client to reach a goal. There will be sessions added to the goal each time you work with the client toward it. You may have multiple Case Management Goals open at one time, and do not need to work on them simultaneously.



Goods and Services

- How to Enter a Goods and Services Entry.









Goods and Services

- You can Add, Edit, or View Goods and Service entries from this page.
- It is set to view the last 30 days, but you can change this by selecting a different length of time.

Client - Goods and Services

30Days 90Days 180Days All

Show 10 entries Filter items

Service Provider	Date	Details	Action
County of Simcoe	2023-04-17 - 2023-04-17	Food	  
Lighthouse - Orillia Christian Centre	2023-04-21 - 2023-04-21	Food	  

Express Good Express Service

1

Goods and Services

Add Express Goods Transaction

Good ★

Program + - ★

Unit Of Measure ★

Unit Price \$

Reason for Service ★

Comments

Add Express Services Transaction

Service ★

Program + - ★

Reason for Service ★

Expended Hours

Expended Minutes

Referred to

Comments



Goods and Services

Add Express Goods Transaction

Good Blankets x v ★

Program x Outreach + - ★

Unit Of Measure Each x v ★

Unit Price \$

Reason for Service Housing - Lack of x v ★

Comments

Add Express Services Transaction

Service Assistance with Benefits Applications x v ★

Program x Emergency Shelter + - ★

Reason for Service Financial - Crisis x v ★

Expended Hours

Expended Minutes

Referred to Select an option

Comments



Goods and Services






- You can see the new entries on the list.

Client - Goods and Services

30Days 90Days 180Days All

Show 10 entries

Filter items

Service Provider	Date	Details	Action
County of Simcoe	2023-04-17 - 2023-04-17	Food	  
Lighthouse - Orillia Christian Centre	2023-04-21 - 2023-04-21	Food	  
The Busby Centre - Barrie	2023-05-04 - 2023-05-04	Blankets	  
The Busby Centre - Barrie	2023-05-04 - 2023-05-04	Assistance with Benefits Applications	  

1

+ Express Good

+ Express Service















- Need to change the date because 1 is from yesterday, not today?

Client - Goods and Services

30Days 90Days 180Days All

Show 10 entries Filter items

Service Provider	Date	Details	Action
County of Simcoe	2023-04-17 - 2023-04-17	Food	  
Lighthouse - Orillia Christian Centre	2023-04-21 - 2023-04-21	Food	  
The Busby Centre - Barrie	2023-05-04 - 2023-05-04	Blankets	  
The Busby Centre - Barrie	2023-05-04 - 2023-05-04	Assistance with Benefits Applications	  

Express Good Express Service

Client - Edit Goods and Services

Reason for Service: Housing - Lack of

Program: Outreach

Referred by:

Referred from: Select an option

Referred to: Select an option

Start Date and Time: 2023-05-03 12:06 PM

Case Management Activity: Select an option

Number of Individuals:

Comments:

Save Cancel

Created by: Forward, Shannon
Date Created: 2023-05-04

Updated by: Forward, Shannon
Date Updated: 2023-05-04















Goods and Services

- You can see the date has changed for the entry.

Client - Goods and Services

30Days 90Days 180Days All

Show 10 entries Filter items

Service Provider	Date	Details	Action
County of Simcoe	2023-04-17 - 2023-04-17	Food	  
Lighthouse - Orillia Christian Centre	2023-04-21 - 2023-04-21	Food	  
The Busby Centre - Barrie	2023-05-03 - 2023-05-03	Blankets	  
The Busby Centre - Barrie	2023-05-04 - 2023-05-04	Assistance with Benefits Applications	  

1













+ Express Good + Express Service

Goods and Services


- Need to add additional entries from the same day?

Client - Goods and Services

30Days 90Days 180Days All

Service Provider	Date	Details	Action
County of Simcoe	2023-04-17 - 2023-04-17	Food	  
Lighthouse - Orillia Christian Centre	2023-04-21 - 2023-04-21	Food	  
The Busby Centre - Barrie	2023-05-03 - 2023-05-03	Blankets	  
The Busby Centre - Barrie	2023-05-04 - 2023-05-04	Assistance with Benefits Applications	  

 Express Good

 Express Service



- You can see the information as well as 2 tabs: 1 for Goods and 1 for Services.

Goods and Services

Service Provider The Busby Centre - Barrie **Start Date and Time** 2023-05-04 12:09 PM
Program Emergency Shelter **End Date and Time** 2023-05-04 12:09 PM
Reason for Service Financial - Crisis **Referred by**
Case Management Activity N/A **Referred from**
Number of Individuals **Referred to**
Comments

Goods Services

Showing 0 to 0 of 0 entries | Show 10 entries Filter items

Good	Quantity	Unit Cost	Unit Price	Unit Of Measure	Action
No data is available in the table					

[Add Good](#)

[Back to Goods and Services List](#) [Edit Goods and Services Details](#)

Goods and Services

Service Provider The Busby Centre - Barrie **Start Date and Time** 2023-05-04 12:09 PM
Program Emergency Shelter **End Date and Time** 2023-05-04 12:09 PM
Reason for Service Financial - Crisis **Referred by**
Case Management Activity N/A **Referred from**
Number of Individuals **Referred to**
Comments

Goods Services

Showing 1 to 1 of 1 entries | Show 10 entries Filter items

Service	Date	Unit Cost	Unit Price	Action
Assistance with Benefits Applications	2023-05-04 12:09 PM			Edit Delete

[Add Service](#)

[Back to Goods and Services List](#) [Edit Goods and Services Details](#)



Goods and Services

- You can see when adding additional entries less information is required than when completing a new entry.

Add Good

Good Select an option ★

Unit Of Measure Select an option ★

Quantity

Unit Cost \$

Unit Price \$

Add Service

Service Select an option ★

Start Date and Time 2023-05-04 12:30 PM ★

End Date and Time

Expended Hours 0

Expended Minutes 0

Service Cost \$

Service Price \$



Goods and Services

- You can see the new entries on the Goods and Services tabs.

Goods Services

Showing 1 to 1 of 1 entries | Show 10 entries Filter items

Good	Quantity	Unit Cost	Unit Price	Unit Of Measure	Action
Clothing				Each	

[Add Good](#)

1

[← Back to Goods and Services List](#) [Edit Goods and Services Details](#)

Goods Services

Showing 1 to 2 of 2 entries | Show 10 entries Filter items

Service	Date	Unit Cost	Unit Price	Action
Advocacy	2023-05-04 12:30 PM			
Assistance with Benefits Applications	2023-05-04 12:09 PM			

[Add Service](#)

1

[← Back to Goods and Services List](#) [Edit Goods and Services Details](#)















Goods and Services

- You will also see them all together on the main Goods and Services page.

Client - Goods and Services

30Days 90Days 180Days All

Show 10 entries Filter items













Service Provider	Date	Details	Action
County of Simcoe	2023-04-17 - 2023-04-17	Food	  
Lighthouse - Orillia Christian Centre	2023-04-21 - 2023-04-21	Food	  
The Busby Centre - Barrie	2023-05-03 - 2023-05-03	Blankets	  
The Busby Centre - Barrie	2023-05-04 - 2023-05-04	3 Goods / Services	  

Express Good Express Service

Client - Goods and Services

30Days 90Days 180Days All

Show 10 entries Filter items


Service Provider	Date	Details	Action
County of Simcoe	2023-04-17 - 2023-04-17	Food	  
Lighthouse - Orillia Christian Centre	2023-04-21 - 2023-04-21	Food	  
The Busby Centre - Barrie	2023-05-03 - 2023-05-03	Blankets	  
The Busby Centre - Barrie	2023-05-04 - 2023-05-04	3 Goods / Services	  

Express Good Express Service



Goods and Services

- The great thing about Goods and services is that there are some existing reports available in HIFIS for providers.

Goods and Services - Site 

List of all goods and services provided to clients during the reporting period.

Dates: 2023/05/01 - 2023/05/04
Service Provider(s): The Busby Centre - Barrie

Bear, Yogi

Goods and Services	05/03/2023 - 05/03/2023	Unit Cost	Unit Price	Ext. Cost	Ext. Price
Item	Quantity				
Blankets	1				
Total	1				

Goods and Services	05/04/2023 - 05/04/2023	Unit Cost	Unit Price	Ext. Cost	Ext. Price
Item	Quantity				
Clothing					
Total					

Item	Unit Cost	Unit Price	From	To	Expended Time (HH:MM)
Assistance with Benefits Applications			2023-05-04 12:09:50PM	2023-05-04 12:09:50PM	
Advocacy			2023-05-04 12:30:00PM		0:00
Total					0:00

[Report Summary](#)
 Number of Records: 2
 Number of Type of Assistance: 1
 Number of Clients: 1
 END OF REPORT

Goods Summary Report

Date Range: 2023/05/01 to 2023/05/04
Service Provider(s): The Busby Centre - Barrie

Goods Provided	Total			
	Unique Clients	Total Goods Distributed	Total Price	Total Cost
Blankets	1	1		
Total	1	1		

Reason for Service	Total	
	Unique Clients	Total Transactions
Housing - Lack of	1	1
Total	1	1

Number of Goods Provided per Transaction	Total	
	Unique Clients	Total Transactions
1	1	1
Total	1	1











Case Management

- Case Management is used when we anticipate working with a client on a Goal more than once.
- You do not have to work on a single goal at one time.
- You may move between goals at different stages working with the client.

Case Management

- On the HIFIS Support Centre, there is a Case Management and Goals resource to assist you in the selection of your Case Management Goals.

How-To Guides

-  [How To Access HIFIS with Text Messaging](#)
-  [How To Recovery or Unlock HIFIS Account](#)
-  [How To Run A Report](#)
-  [How To Book In Families](#)
-  [How To Add a Document about a Client](#)
-  [How To Remove a Family Member from Family](#)
-  [HIFIS Job Aid - MVP \(for front-line staff\)](#)
- ★  [Case Management Goals and Sessions Job Aid](#) **New!** (Updated December 2022)



County of Simcoe
Social and Community Services
1110 Highway 26,
Midhurst, Ontario L9X 1N6

Main Line (705) 722-3132
Beeton Area (905) 729-4514
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simcoe.ca



Case Management Goals and Sessions List

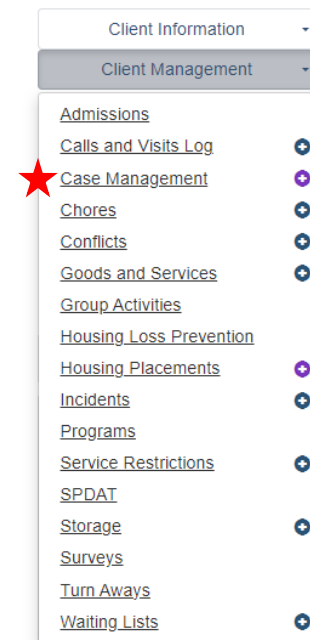
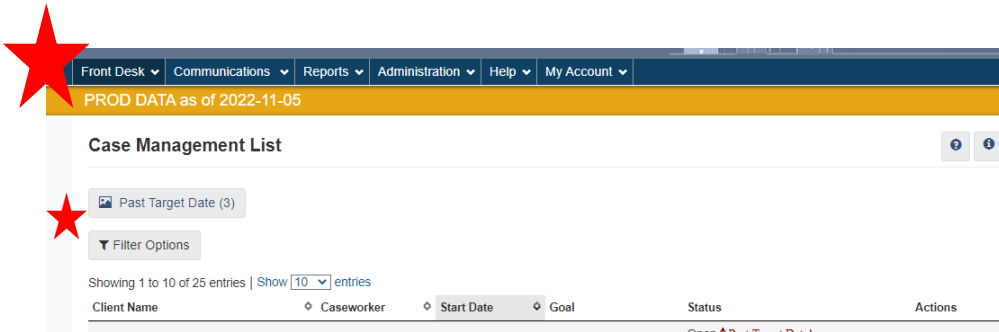
Below you will find a table that includes the 'Case Management Goals' and the available 'Sessions' for each. This list assists HIFIS users to decide which 'Goal' or 'Goals' to select when working with a client, as the 'Sessions' are not visible until the 'Goal' has been created. A client may have multiple 'Goals' open at the same time, working toward them. Close 'Case Management Goals' when complete or no longer being actively worked toward.

Lookup Name	Case Goal
Adoption / Foster Assistance	Child Welfare
Child Access Services	Child Welfare
Family Reunification Support	Child Welfare
Parent Support	Child Welfare
Parenting Skills Training	Child Welfare
Reporting to Authorities	Child Welfare
Anger Management Services	Conflict Resolution
Mediation Services	Conflict Resolution
Police Intervention	Conflict Resolution
Violence / Anger De-Escalation	Conflict Resolution
Addiction Services	Crisis Intervention
Critical Incident Debriefing	Crisis Intervention
Domestic Violence Intervention	Crisis Intervention
Emergency Medical Services	Crisis Intervention
Emergency Placement	Crisis Intervention
Mental Health Services	Crisis Intervention
Physical / Sexual Abuse Intervention	Crisis Intervention
Police Intervention	Crisis Intervention
Rape Care	Crisis Intervention
Suicide Intervention	Crisis Intervention
Violence / Anger De-Escalation	Crisis Intervention



Case Management

- You can access Case Management in the Front Desk (shows all open Case Management records for a service provider) or in the clients account.



Case Management

- You can view the clients goals. It is set to view the Open records, but you can select the Closed or All tab.

Client - Case Management List

Open Closed All

Show 10 entries Filter items

Caseworker	Service Provider	Goal	Status	Action
A, G	Lighthouse - Orillia Christian Centre	General - Housing Plan	Open Target Date: N/A	
A, G	Lighthouse - Orillia Christian Centre	Employment	Open Target Date: N/A	
Forward, Shannon	Lighthouse - Orillia Christian Centre	General - Housing Plan	Open Target Date: N/A	

+ Add Case + Client - Multiple Goal Session

1

Case Management

- From the Case Management module, you can create a new case, multiple session entry or single session entry.

Client - Case Management List

Open Closed All

Show 10 entries Filter items

Caseworker	Service Provider	Goal	Status	Action
A, G	Lighthouse - Orillia Christian Centre	General - Housing Plan	Open Target Date: N/A	
A, G	Lighthouse - Orillia Christian Centre	Employment	Open Target Date: N/A	
Forward, Shannon	Lighthouse - Orillia Christian Centre	General - Housing Plan	Open Target Date: N/A	

1

Case Management

- To Create a new Case Management Goal select the Add Case option and complete the Case Management information.

Client - Add Case Management

Family Members: Select an option + -

Caseworker: Select an option *

Goal: Select an option *

Status: Open x *

Start Date: 2023-05-04 1:06 PM *

Target Date: [empty]

Program: Select an option + - *

Contributing Factors: Select an option + -

Save Cancel

Client - Add Case Management

Family Members: Select an option + -

Caseworker: Forward, Shannon x *

Goal: General - Housing Plan x *

Status: Open x *

Start Date: 2023-05-04 1:06 PM *

Target Date: [empty]

Program: Emergency Shelter + - *

Contributing Factors: Select an option + -

Save Cancel



Case Management

- Your Case Management Goal will appear as this when you select the pencil icon to edit it. You will enter your Sessions for the Goal here.

Display Case Management

Details **Sessions** Documents Case Comments

Goal General - Housing Plan

Family Members

Caseworker Forward, Shannon

Service Provider The Busby Centre - Barrie

Status Open

Contributing Factors

Program Emergency Shelter

Start Date 2023-05-04 1:06 PM

Target Date - -

Expended Time 0 Hrs 0 Mins

Elapsed Time 0 Days

[Edit](#) [Cancel](#)

Created by: Forward, Shannon
Date Created: 2023-05-04

Updated by: Forward, Shannon
Date Updated: 2023-05-04

Display Case Management

Details Sessions **Documents** Case Comments

Show 10 entries Filter items

Activity	Date	Caseworker	Action
No data is available in the table			

[Add Session](#) [View All Session Details](#)

Created by: Forward, Shannon
Date Created: 2023-05-04

Updated by: Forward, Shannon
Date Updated: 2023-05-04



Case Management

Client - Add Case Session

Goal General - Housing Plan

Activity Developing Individualized Service Plan

Description
Short Point for note here
Made plan for future sessions.

Date and Time 2023-05-04 1:15 PM

Expended Time
Expended Hours 0
Expended Minutes 0

Caseworker Forward, Shannon

Responsibility Select an option

Agency Involved / Referral Select an option

Client Present No

Family Present No




Save Cancel

Client - Edit Case Management

Programs

Details Sessions Documents Case Comments

Show 10 entries Filter items

Activity	Date	Caseworker	Action
Developing Individualized Service Plan	2023-05-04 1:15 PM	Forward, Shannon	  

1

Add Session View All Session Details

Created by: Forward, Shannon
Date Created: 2023-05-04

Updated by: Forward, Shannon
Date Updated: 2023-05-04



Case Management





- You can also select the See All Session Details related to that particular goal.

Client - Edit Case Management

Programs

Details Sessions Documents Case Comments

Show 10 entries Filter items

Activity	Date	Caseworker	Action
Completing Honest Monthly Budget	2023-05-04 1:18 PM	Forward, Shannon	 
Developing Individualized Service Plan	2023-05-04 1:15 PM	Forward, Shannon	 

[Add Session](#) [View All Session Details](#)

Sessions - Bear, Yogi

Goal: General - Housing Plan
Caseworker: Forward, Shannon
Service Provider: The Busby Centre - Barrie
Status: Open
Factor:
Family: N/A
Start Date and Time: 2023-05-04
Target Date: N/A
End Date and Time: N/A
Total Elapsed Time: 0: 0 Hrs
Total Expended Time: 0 Days

Sessions

Activity	Description	Date	Expended Time	Service Provider	Caseworker	Responsibility	Agency Involved / Referral	Client Present	Family Present
Completing Honest Monthly Budget	Worked on budget	2023-05-04	0 Expended Hours, 0 Expended Minutes	The Busby Centre - Barrie	Forward, Shannon			No	No
Developing Individualized Service Plan	Short Point for note here Made plan for future sessions.	2023-05-04	0 Expended Hours, 0 Expended Minutes	The Busby Centre - Barrie	Forward, Shannon			No	No

[Cancel](#)













Case Management

- To add a session with multiple goals you select that option from the Case Management page.

Client - Case Management List

Open Closed All

Show 10 entries Filter items

Caseworker	Service Provider	Goal	Status	Action
A, G	Lighthouse - Orillia Christian Centre	General - Housing Plan	Open Target Date: N/A	 
A, G	Lighthouse - Orillia Christian Centre	Employment	Open Target Date: N/A	 
Forward, Shannon	The Busby Centre - Barrie	General - Housing Plan	Open Target Date: N/A	 
Forward, Shannon	The Busby Centre - Barrie	General Health	Open Target Date: N/A	 
Forward, Shannon	Lighthouse - Orillia Christian Centre	General - Housing Plan	Open Target Date: N/A	 

+ Add Case **Client - Multiple Goal Session**

Client - Multiple Goal Session

Goals
General - Housing Plan - Forward, Shannon
General Health - Forward, Shannon

Activity
Case Planning

Description
planned for doctor visit and housing strategy

Date and Time
2023-05-04 1:31 PM

Expended Time - Total
Expended Hours 0
Expended Minutes 0

Split time equally between goals

Expended Time - "General - Housing Plan - Forward, Shannon"
Expended Hours 0
Expended Minutes 0

Expended Time - "General Health - Forward, Shannon"
Expended Hours 0
Expended Minutes 0

Caseworker
Forward, Shannon

Responsibility
Select an option













Case Management

- When you are no longer working with a client, you must close open Case Management records.

Client - Case Management List

Open Closed All

Show 10 entries

Caseworker	Service Provider	Goal	Status	Action
A, G	Lighthouse - Orillia Christian Centre	General - Housing Plan	Open Target Date: N/A	 
A, G	Lighthouse - Orillia Christian Centre	Employment	Open Target Date: N/A	 
Forward, Shannon	The Busby Centre - Barrie	General - Housing Plan	Open Target Date: N/A	 
Forward, Shannon	The Busby Centre - Barrie	General Health	Open Target Date: N/A	 
Forward, Shannon	Lighthouse - Orillia Christian Centre	General - Housing Plan	Open Target Date: N/A	 

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Add Case Client - Multiple Goal Session

Client - Edit Case Management

Programs

Details Sessions Documents Case Comments

Goal: General - Housing Plan

Family Members: Select an option

Caseworker: Forward, Shannon

Program: Emergency Shelter

Status: Closed - Goal(s) not...

Contributing Factors: Select an option

Start Date: 2023-05-04 1:06 PM

Target Date: [empty]

End Date: 2023-05-04

Total Expended Time: 0 Expended Hours 0 Expended Minutes

Total Elapsed Time: 0 Days

Save Cancel



Case Management

- There are reports available for Case Management in HIFIS for service providers

Case Management - Clients

Detailed list of all the Case Management Sessions and Activities for selected client.



Client: Bear, Yogi

Goal	General - Housing Plan	Case Worker	Forward, Shannon	Date Opened	2023/05/04
Service Provider	The Busby Centre - Barrie	Case Status	Open	Target Date	
Contributing Factor(s)		Program(s)	Emergency Shelter	Date Closed	
Sessions					
Activity (Description)	Date and Time (Duration)	Case Worker	Referral	Responsibility	Present: Client? Family?
Developing Individualized Service Plan	2023/05/04 1:15:00PM (0m)	Forward, Shannon			
Completing Honest Monthly Budget	2023/05/04 1:18:00PM (0m)	Forward, Shannon			

Case Management Goals & Activities - Summary

List of the Case Management sessions in progress or completed during the reporting period.



Dates: 2023/05/01 - 2023/05/04

The Busby Centre - Barrie Grouped by Goal

Goal	Total	With Client Present	With Family Present	Time Spent (HH:MM)
General - Housing Plan				
Activity				
Completing Honest Monthly Budget	1	0	0	0:00
Developing Individualized Service Plan	1	0	0	0:00
Total for Goal	2	0	0	0:00

All Goals	Total	With Client Present	With Family Present	Time Spent (HH:MM)
Activity				
Completing Honest Monthly Budget	1	0	0	0:00
Developing Individualized Service Plan	1	0	0	0:00
Total for Service Provider	2	0	0	0:00

Grouped by Activity

Goal	Total	With Client Present	With Family Present	Time Spent (HH:MM)
General - Housing Plan	1	0	0	0:00
Total for Activity	1	0	0	0:00

Goal	Total	With Client Present	With Family Present	Time Spent (HH:MM)
General - Housing Plan	1	0	0	0:00
Total for Activity	1	0	0	0:00

All Activities	Total	With Client Present	With Family Present	Time Spent (HH:MM)
Goal				
General - Housing Plan	2	0	0	0:00



Need Assistance?

1. Visit the HIFIS Support Centre at www.Simcoe.ca/hifis and review the available resources.
2. Connect with a SuperUser from the service provider you work with.
3. Email the HIFIS Support Desk at hifis@Simcoe.ca.

