

County of Simcoe

Training Manual

Training Manual

Housing First / RRH / Housing Support Worker

County of Simcoe

Prepared by

ACRE Consulting

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CHAPTER 2: Case Management

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Understanding Case Management in HIFIS 4



The Case Management module contains **Case Files**. A Case File in HIFIS 4 is a type of **service record** that indicates that a **Client** is working with a **Caseworker** during a particular **date range** to achieve a particular **goal**.

The Case Management module is the logical place to store information regarded to case management activities. Features of the Case Management module include:

- » Opening a Case File to store a related series of information about activities with a Client
- » Assigning a Caseworker to the Client
- » Including other family members in the Case File
- » Selecting a goal that the Caseworker and the Client are working towards
- » Setting a target date for the completion of the goal
- » Indicating what are the contributing barriers or factors impacting the completion of this goal
- » Tracking the status of the Case File
- » Recording individual activities (Sessions) that are completed while pursuing this goal
- » Setting appointments for this Case File
- » Keeping case notes (Comments) related to this Case File
- » Attaching files (Documents) to this Case File
- » Custom Table support



One Case Per Goal

Each Case File has a one-to-one relationship with a goal (sometimes referred to as the desired outcome for that Case File). In other words, for every Case File, there is exactly one goal, and for every goal, there is exactly one Case File.

When used as intended, a Client could often have multiple cases open at a time. Each time a Caseworker meets with a client, they would first choose which goal the meeting (or Session) was related to, and record it in the appropriate Case File.



Example: Multiple Case Files in Practice

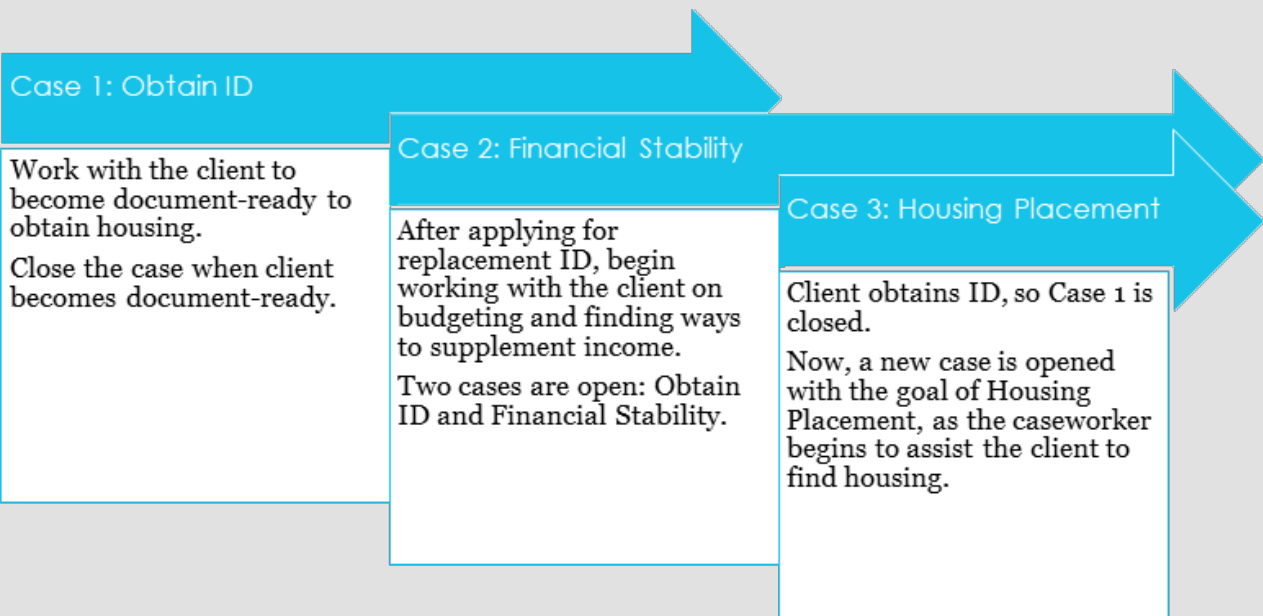
Imagine that Jasmine the Caseworker has been assigned to the client Aladdin, who is homeless. Jasmine sits down and meets with Aladdin, and they decide that the most



important first step for Aladdin would be to obtain valid identification. His wallet was stolen while he was homeless and now he doesn't have any ID at all. Jasmine opens a case in HIFIS with the goal of "Obtain ID." Over the next few weeks, Jasmine meets with Aladdin several times, which she records as Sessions within the Case File with the goal of "Obtain ID."

Finally, applications are in the mail, and Jasmine starts to switch gears and work with Aladdin on Financial Stability. She's noticed that he doesn't have a solid idea of what his monthly budget should be. She opens a second Case in HIFIS with the goal of "Financial Stability" even though the first Case File is not closed yet. She meets with Aladdin a few times, focusing on the goal of Financial Stability, before Aladdin's replacement identification arrives in the mail. She closes the Obtain ID Case File with a status of "Closed - Success." Now that Aladdin has all the documents he needs to be able to sign a lease, Jasmine opens a new Case File with the goal of "Housing Placement."

Having two open Cases for Aladdin, sometimes when Jasmine meets with him, they work on both goals simultaneously. These times, she can add a "Multiple Goal Session," indicating that she met with Aladdin and in one Session they worked on two or more Goals.



Case Management List

The **Case Management List** is reached via the Front Desk Menu by clicking on **CASE MANAGEMENT**. This page shows a list of all Cases opened by the active Service Provider, which can be filtered to only show a sub-section of all Cases.

Case Management List



Show only Cases past their Target Date

Past Target Date (1)

Filter Options **Filter Cases**

Showing 1 to 6 of 6 entries | Show 10 entries

Client Name	Caseworker	Start Date	Goal	Status	Actions
Gale, Dorothy	Lhu, Cthu	2017-12-11	Financial Stability	Open Past Target Date! Target Date: 2018-05-10	
Hearts, Queen of	Lhu, Cthu	2017-11-14	Mental Health	Closed - Success Target Date: N/A	
Van Helsing, Abraham	Lhu, Cthu	2017-09-28	Employment	Open Upcoming Target Date! Target Date: 2018-08-17	
Rabbit, White	King, Yellow	2017-07-18	Conflict Resolution	Closed - Success Target Date: N/A	
Dracula, Count	Lhu, Cthu	2017-05-15	Skill Enhancement	Closed - Goal(s) not met Target Date: N/A	
Nemo, Captain	Lhu, Cthu	2017-05-09	Employment Maintenance	Open Target Date: N/A	

Add Case **Add new Case**

Display this Case **Edit this Case**

1

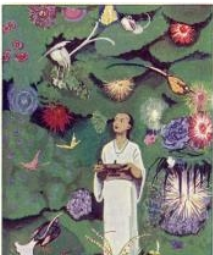
Client - Case Management List

The **Client - Case Management List** is reached via the Client Management Menu by clicking on Case Management. This page shows a list of all Cases belonging to the active Client, which can be filtered to only show a sub-section of all Cases.

The Client - Case Management List shows all Cases belonging to the active Client, including ones opened by other Service Providers. Therefore, the information on this page (Caseworker, Service Provider, Goal, Status, and Target Date) are shared with Users at other Service Providers. However Users can only Display or Edit Case Files that have been opened by Service Providers that the User has been granted appropriate Rights to.

Client Information ▾

Client Management ▾



Aladdin Ali





Consent Status	Active
File Number	000000019
Current Stay	Not Booked In
Gender	Male
Date of Birth	1973-06-18 (45)
Family	Yes

Client - Case Management List



Open Closed All
Filter by case status

Past Target Date (1)
Show only Cases past their Target Date

Show entries
 Filter by text

Caseworker	Service Provider	Goal	Status	Action
Clark, Chris	Sharing is Caring	Employment	Open Target Date: 2017-12-31 ▲ Past Target Date!	
Smith, Sam	Wonderland Shelter	Financial Stability	Open Target Date: N/A	
Adams, Alex	My Service Provider	Shelter Diversion	Open Target Date: N/A	 
Adams, Alex	My Service Provider	Skill Enhancement	Open Target Date: 2018-01-31 ▲ Past Target Date!	 

+ Add Case + Client - Multiple Goal Session

 Display this Case 
 Edit this Case 

1

Add new Case

Add new Session where multiple Goals were worked towards

How To: Add a Case

Go to the Case Management List

1. Click on the **FRONT DESK MENU**
2. Click on **CASE MANAGEMENT**



Now you're on the [Case Management List \(on page 7\)](#)



Alternatively, you could open a **Client File** and use the **Client Management Menu** to go to the [Client - Case Management List \(on the previous page\)](#) instead of going to the [Case Management List \(on page 7\)](#).

Add a Case

1. Click on the **ADD CASE** button.



Now you're on the **Client - Add Case Management** screen

Client - Add Case Management

Client Name *

Family Members + -

Caseworker *

Goal *

Status *

Start Date *

Target Date

Program + -

Contributing Factors + -

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2. Select the Client Name. If you arrived here from the **Client - Case Management List** screen, this field is already filled out.
3. If there are any family members associated with this case, choose the family members involved by selecting them in the Family Members field.



The Family Members field will only display if the selected client has family members.

4. Select the Caseworker assigned to the case.
5. Select the Goal for this Case.
6. Select the Case Status. Most of the time, this should be "Open."
7. Verify the Start Date. The default value is the current date, but this can be changed if needed.
8. Enter the Target Date for completion of this Case.
9. Select the Program(s) this Case is part of.
10. Select any of the Client's existing Contributing Factors that are related to this Case.
11. Click the **SAVE** button.



Now you're on the **Display Case** screen

How To: Display a Case

Go to the Case Management List

1. Click on the **FRONT DESK MENU**
2. Click on **CASE MANAGEMENT**



Now you're on the [Case Management List \(on page 7\)](#)



Alternatively, you could open a **Client File** and use the **Client Management Menu** to go to the [Client - Case Management List \(on page 8\)](#) instead of going to the [Case Management List \(on page 7\)](#).

Display

1. Click on  for the record you would like to display



Now you're on the **Display** Screen

How To: Edit a Case

Go to the Case Management List

1. Click on the **FRONT DESK MENU**
2. Click on **CASE MANAGEMENT**



Now you're on the [Case Management List \(on page 7\)](#)



Alternatively, you could open a **Client File** and use the **Client Management Menu** to go to the [Client - Case Management List \(on page 8\)](#) instead of going to the [Case Management List \(on page 7\)](#).

Edit a Record

1. Click on  or  **Edit** for the record you would like to edit



Now you're on the **Edit** Screen

How To: Close a Case

Edit a Case

See [Edit a Case \(on the previous page\)](#)

Close the Case

1. Change the Status field to either "Closed - Success" or "Closed - Goal(s) not met"
2. Verify the End Date
3. Click on **SAVE**


How To: Add a Session to an Existing Case

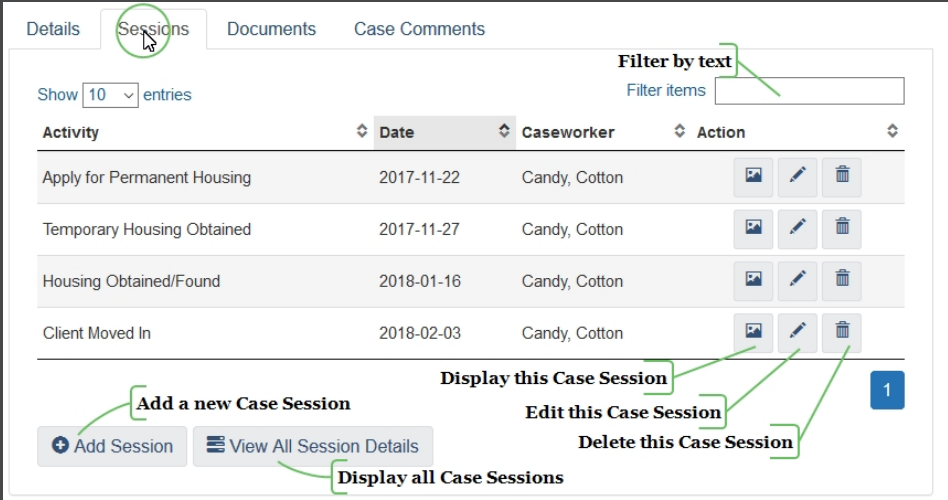
Edit a Case

See [Edit a Case \(on page 12\)](#)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

 You're now on the **Sessions** tab



Details **Sessions** Documents Case Comments

Filter by text
Filter items

Show 10 entries

Activity	Date	Caseworker	Action
Apply for Permanent Housing	2017-11-22	Candy, Cotton	
Temporary Housing Obtained	2017-11-27	Candy, Cotton	
Housing Obtained/Found	2018-01-16	Candy, Cotton	
Client Moved In	2018-02-03	Candy, Cotton	

Add a new Case Session

Display this Case Session

Edit this Case Session

Delete this Case Session


Display all Case Sessions

1

+ Add Session **≡** View All Session Details

Add a Case Session

1. Click on the **ADD SESSION** button

 You're now on the **Client - Add Case Session** screen

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Client - Add Case Session

Goal **General**

Activity Select an option ★

Description

Date and Time

Expended Time

Expended Hours

Expended Minutes

Caseworker Select an option ★

Responsibility Select an option

Agency Involved / Referral Select an option

Client Present No

Family Present No

Save Cancel

2. Select an Activity to reflect what occurred during this Session.
3. Enter a Description.
4. Verify the Date and Time of this Session. The default value is the current date and time, but this can be changed if needed.
5. Enter the duration of this Session in Hours and Minutes.
6. Select the name of the Caseworker who met with the Client this Session.
7. Select whose Responsibility it is to follow-up on the Session.
8. Select if there was an outside Agency involved in this Session.
9. Indicate whether the Client was present.
10. Indicate whether the client's Family was present.
11. Click the **SAVE** button.

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You're now on the **Display Case Management** Screen

How To: Add a Session to Multiple Existing Cases

Go to the Client Case Management List

1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **CASE MANAGEMENT**



Now you're on the [Client - Case Management List \(on page 8\)](#)

Add a Case Session

1. Click on the **CLIENT - MULTIPLE GOAL SESSION** button



You're now on the **Client - Multiple Goal Session** screen

Client - Multiple Goal Session

Goals Select an option + - ★

Activity Select an option ▼ ★

Description

Date and Time ★

Expended Time

Expended Hours

Expended Minutes

Caseworker Select an option ▼ ★

Responsibility Select an option ▼

Agency Involved / Referral Select an option ▼

Client Present No

Family Present No

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2. Select the Goals that this Session was working towards.
3. Select an Activity to reflect what occurred during this Session.
4. Enter a Description.
5. Verify the Date and Time of this Session. The default value is the current date and time, but this can be changed if needed.
6. Enter the duration of this Session in Hours and Minutes.
7. Select the name of the Caseworker who met with the Client this Session.
8. Select whose Responsibility it is to follow-up on the Session.
9. Select if there was an outside Agency involved in this Session.
10. Indicate whether the Client was present.
11. Indicate whether the client's Family was present.
12. Click the **SAVE** button.



You're now on the **Client - Case Management List** screen

How To: Display a Session

Edit a Case

See [Edit a Case \(on page 12\)](#)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

You're now on the **Sessions** tab

Details Sessions Documents Case Comments

Filter by text
Filter items

Show 10 entries

Activity	Date	Caseworker	Action
Apply for Permanent Housing	2017-11-22	Candy, Cotton	
Temporary Housing Obtained	2017-11-27	Candy, Cotton	
Housing Obtained/Found	2018-01-16	Candy, Cotton	
Client Moved In	2018-02-03	Candy, Cotton	

1

Add a new Case Session

Add Session View All Session Details

Display all Case Sessions

Display this Case Session

Edit this Case Session

Delete this Case Session

Display

1. Click on for the record you would like to display

Now you're on the **Display** Screen

How To: Display All Sessions for this Case

Edit a Case

See [Edit a Case \(on page 12\)](#)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

The screenshot shows the 'Sessions' tab selected in a software interface. A notification bubble at the top left says 'You're now on the Sessions tab'. The interface includes a 'Filter by text' search bar, a 'Show 10 entries' dropdown, and a table with columns for Activity, Date, Caseworker, and Action. The table lists four sessions: 'Apply for Permanent Housing' (2017-11-22), 'Temporary Housing Obtained' (2017-11-27), 'Housing Obtained/Found' (2018-01-16), and 'Client Moved In' (2018-02-03). Below the table are buttons for 'Add Session', 'View All Session Details', and 'Add a new Case Session'. Annotations with green boxes and arrows point to the 'Sessions' tab, the filter bar, the table, and the 'View All Session Details' button. A blue box with the number '1' is located near the bottom right of the table area.

Display

1. Click on the **VIEW ALL SESSION DETAILS** button

A dark grey notification bubble with a green icon of a document with a checkmark. The text inside the bubble reads: 'Now you're on the Sessions Screen'.

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Sessions - Wonderland, Alice



Goal Housing Placement
Caseworker Candy, Cotton
Service Provider Demo Organization
Status Open
Factor Housing - Loss of
Family N/A
Start Date and Time 2017-11-22
Target Date N/A
End Date and Time 2018-08-16
Total Elapsed Time 05: 30 Hrs
Total Expended Time 267 Days

Sessions

Activity	Description	Date	Expended Time	Service Provider	Caseworker	Responsibility	Agency Involved / Referral	Client Present	Family Present
Apply for Permanent Housing	Completed application for social housing registry	2017-11-22	0 Expended Hours, 30 Expended Minutes	Demo Organization	Candy, Cotton		Housing Services	Yes	No
Temporary Housing Obtained	Client is moving in with cousin temporarily.	2017-11-27	2 Expended Hours, 0 Expended Minutes	Demo Organization	Candy, Cotton	Client		Yes	No
Housing Obtained/Found	Social housing became available.	2018-01-16	0 Expended Hours, 0 Expended Minutes	Demo Organization	Candy, Cotton	Client	Housing Services	No	No
Client Moved In		2018-02-03	3 Expended Hours, 0 Expended Minutes	Demo Organization	Candy, Cotton	Client		Yes	Yes

✕ Cancel

How To: Edit a Session

Edit a Case

See [Edit a Case \(on page 12\)](#)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

You're now on the **Sessions** tab

Details **Sessions** Documents Case Comments

Filter by text
Filter items

Show 10 entries

Activity	Date	Caseworker	Action
Apply for Permanent Housing	2017-11-22	Candy, Cotton	
Temporary Housing Obtained	2017-11-27	Candy, Cotton	
Housing Obtained/Found	2018-01-16	Candy, Cotton	
Client Moved In	2018-02-03	Candy, Cotton	

Add a new Case Session
+ Add Session View All Session Details

Display this Case Session
Edit this Case Session
Delete this Case Session

Display all Case Sessions

Edit a Record

1. Click on or Edit for the record you would like to edit

Now you're on the **Edit** Screen

How To: Add a Session Appointment

Edit a Session

See [Edit a Session \(on the previous page\)](#)

Go to the [Session Appointments Tab](#)

1. Click on the **APPOINTMENTS** tab

You're now on the **Appointments** tab

Client - Edit Case Session

Details **Appointments** Comments

Filter by text
Filter items

Show 10 entries

Appointment Date	Appointment Time	Description	Action
2018-08-16	9:22 AM	Follow-up	

Add a new Appointment

Add Appointment

Display this Appointment

Edit this Appointment

Delete this Appointment

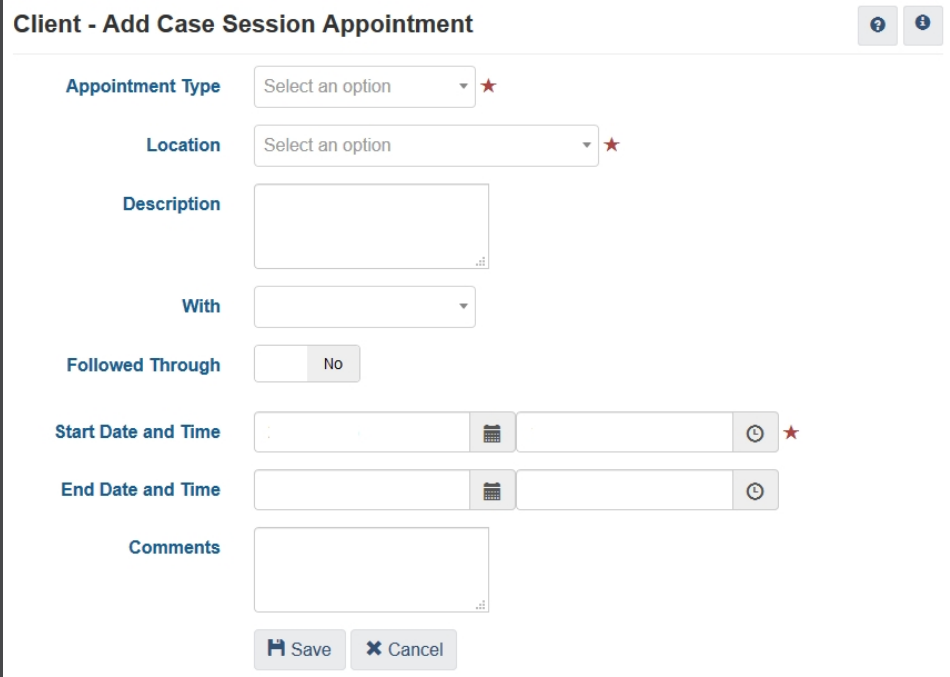
1

Add a Case Session Appointment

1. Click on the **ADD APPOINTMENT** button.

Now you're on the **Client - Add Case Session Appointment** Screen

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The screenshot shows a web form titled "Client - Add Case Session Appointment". The form has the following fields and controls:

- Appointment Type:** A dropdown menu with "Select an option" and a red star icon.
- Location:** A dropdown menu with "Select an option" and a red star icon.
- Description:** A text area.
- With:** A dropdown menu.
- Followed Through:** A radio button labeled "No".
- Start Date and Time:** A date and time picker with a calendar icon and a clock icon, and a red star icon.
- End Date and Time:** A date and time picker with a calendar icon and a clock icon.
- Comments:** A text area.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

2. Select the Type of the Appointment.
3. Select the Location of the Appointment.
4. Enter a brief Description of the Appointment.
5. Select who the Appointment is With.
6. Indicate whether the Client Followed Through on the Appointment.
7. Verify the Start Date and Time of the Appointment. The default value is the current date and time, but this can be changed if needed.
8. Verify the End Date and Time of the Appointment. The default value is two hours in the future from the current date and time, but this can be changed if needed.
9. Enter some additional Comments about the Appointment.
10. Click on the **SAVE** button.



Now you're on the **Client - Edit Case Session** screen on the **Appointments** tab


How To: Add Notes to an Existing Session

Edit a Session

See [Edit a Session](#) (on page 22)

Go to the [Session Comments Tab](#)

1. Click on the **COMMENTS** tab







 You're now on the **Comments** tab




Client - Edit Case Session

Details Appointments **Comments**

Show entries

Filter by text


Date	User	Subject	Action
2018-08-16	Admin	Session Notes	  
2018-08-16	Admin	Follow up with parole officer	  

Display this Case Comment  **Edit this Case Comment**  **Delete this Case Comment** 

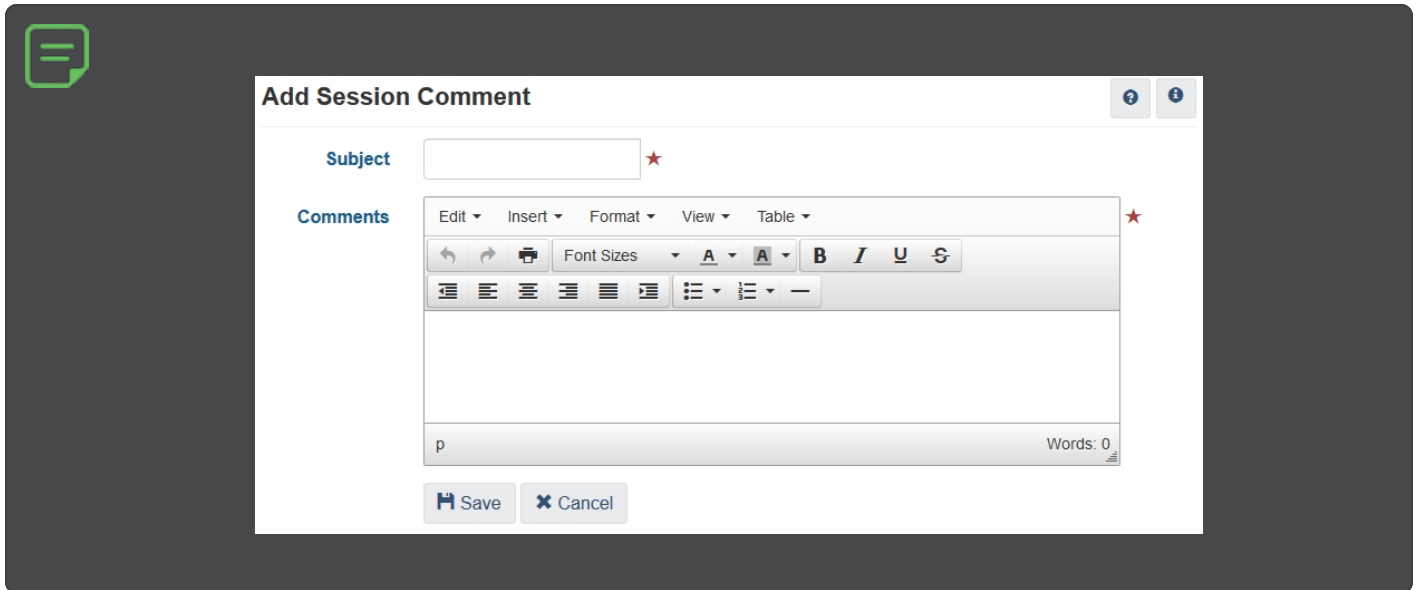
+ Add Comment **Add a new Case Comment**

Add a Session Comment

1. Click on **ADD COMMENT**.

 Now you're on the **Add Session Comment** screen

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2. Enter the Subject.
3. Enter some Comments.
4. Click the **SAVE** button.

How To: Add Notes to an Existing Case

Edit a Case

See [Edit a Case \(on page 12\)](#)

Go to the [Case Comments Tab](#)

1. Click on the **CASE COMMENTS** tab


 You're now on the **Case Comments** tab



Details Sessions Documents **Case Comments**

Show 10 entries

Filter by text
Filter items

Date	User	Subject	Action
2016-10-25	Ryder, Ali	Vegetarian	  
2016-10-25	Ryder, Ali	Arrest on Oct 21	  


Display this Case Comment
Edit this Case Comment
Delete this Case Comment

1

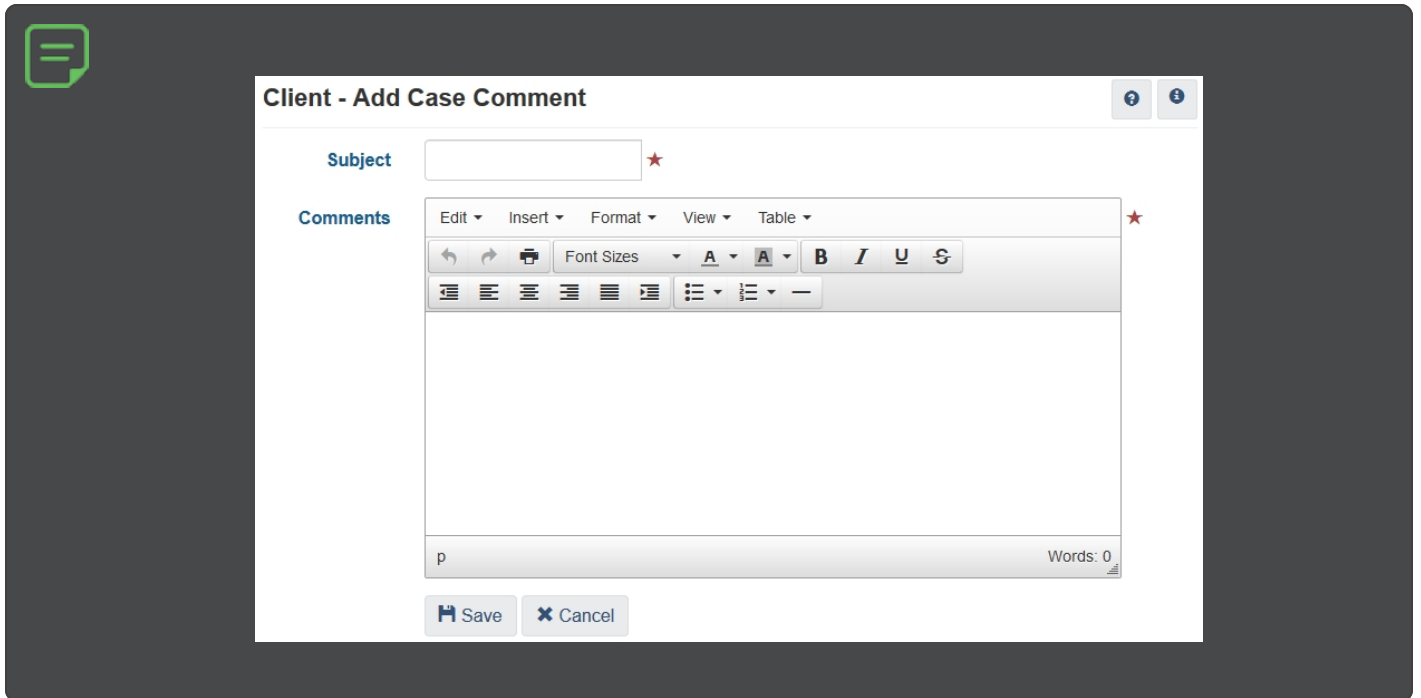
+ Add Comment
Add a new Case Comment

Add Comment

1. Click on **ADD COMMENT**.

 Now you're on the **Client - Add Case Comment** screen

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2. Enter the Subject.
3. Enter some Comments.
4. Click the **SAVE** button.

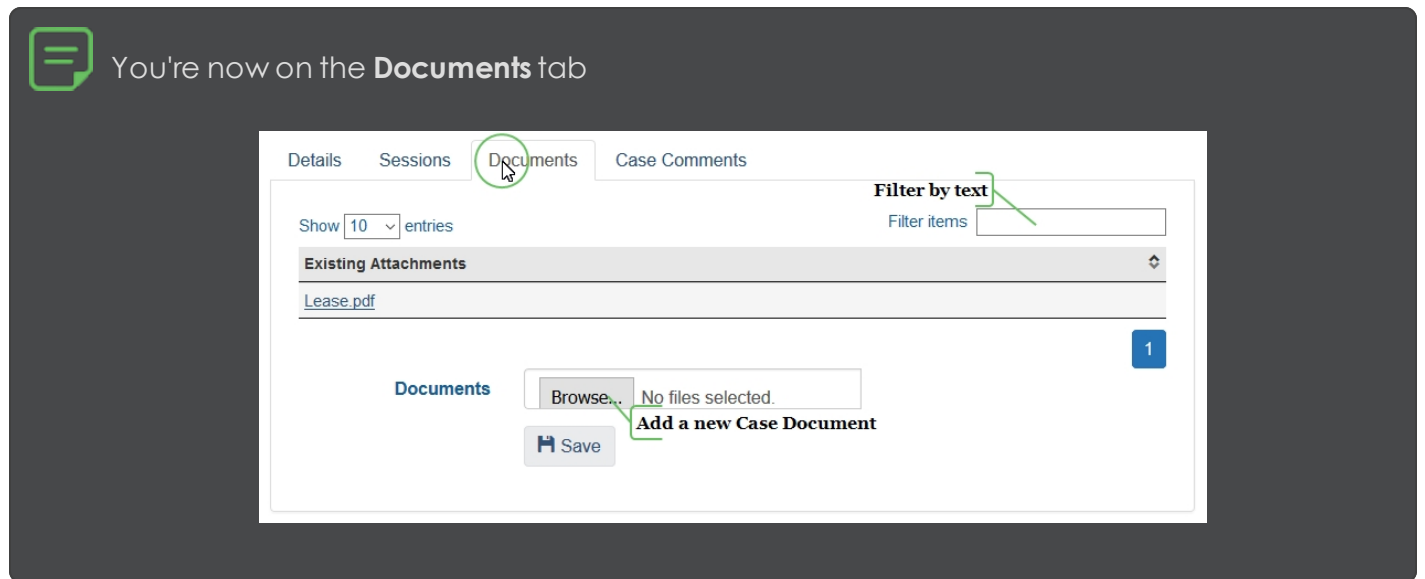
How To: Add a Document to an Existing Case

Edit a Case

See [Edit a Case \(on page 12\)](#)

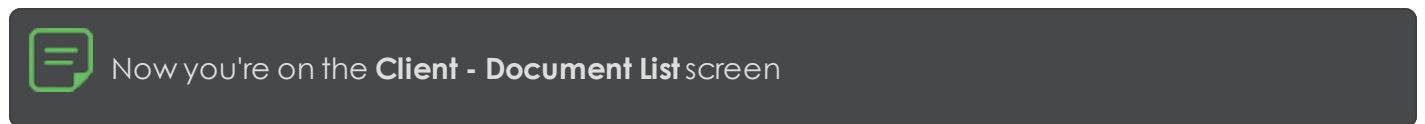
Go to the Documents Tab

1. Click on the **DOCUMENTS** tab



Add Document

1. Click **BROWSE....**
 - a. In the File Upload window, navigate to and select the file you wish to upload from your computer.
 - b. Click **OPEN**. The File Upload window will close and your file name will be listed in the Documents field.
2. Click the **SAVE** button.



CHAPTER 3: Goods and Services


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How To: Add an Express Good

Go to the Goods and Services List










1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

 Now you're on the **Goods and Services List**

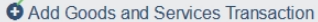
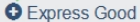
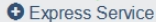
Goods and Services List


Filter: 1 Week(s) Filter by date range Filter by text
Filter items

Show 10 entries

Client Name	Start Date - End Date	Details	Action
Kent, Clark	2017-10-24 - 2017-10-24	Food	  
Rogers, Steve	2017-10-23 - 2017-10-23	<ul style="list-style-type: none">3 Goods / Services• Goods• Services<ul style="list-style-type: none">◦ Advocacy◦ Counseling◦ Financial Aid	Display this Transaction    Manage this Transaction Edit this Transaction
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	  


Add a new Transaction Add an Express Good Add an Express Service

 You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Add an Express Good

1. Click on the **EXPRESS GOOD** button.

 Now you're on the **Add Express Goods Transaction Screen**

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The screenshot shows a web form titled "Add Express Goods Transaction". On the left side, there are several input fields: "Client Name(s)" with a red star, "Good" with a dropdown menu and a red star, "Program" with a dropdown menu and plus/minus buttons, "Unit Of Measure" with a dropdown menu and a red star, "Unit Price" with a numeric input field, "Reason for Service" with a dropdown menu and a red star, and "Comments" with a text area. At the bottom left are "Save" and "Cancel" buttons. On the right side, there is a "Goods Item Info" section with the text "No predefined item selected." and a help icon in the top right corner.

2. Enter the Client's name. If you arrived at this screen from the **Client - Goods and Services** List, the client has already been selected.
3. Select the Good from the drop-down list
4. Select the Program(s) this Good is associated with.
5. Select the Unit of Measure for this Good
6. Select the Unit Price (price per unit) for this Good
7. Select the Reason for Service from the drop-down list.
8. Record some comments about this Good
9. Click **SAVE** when done, or **CANCEL** to go back




Now you're on the **Goods and Services List**

How To: Add an Express Service

Go to the Goods and Services List










1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

 Now you're on the **Goods and Services List**

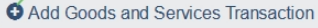
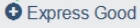
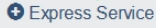
Goods and Services List


Filter: 1 Week(s) Filter by date range Filter by text
Filter items

Show 10 entries

Client Name	Start Date - End Date	Details	Action
Kent, Clark	2017-10-24 - 2017-10-24	Food	  
Rogers, Steve	2017-10-23 - 2017-10-23	<ul style="list-style-type: none">3 Goods / Services• Goods• Services<ul style="list-style-type: none">◦ Advocacy◦ Counseling◦ Financial Aid	  
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	  


Add a new Transaction Add an Express Good Add an Express Service

 You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Add an Express Service

1. Click on the **EXPRESS SERVICE** button.

 Now you're on the **Add Express Services Transaction** Screen

The screenshot shows a web form titled "Add Express Services Transaction". The form has several input fields: "Client Name(s)" with a red asterisk, "Service" with a dropdown menu and a red asterisk, "Program" with a dropdown menu and plus/minus buttons, "Reason for Service" with a dropdown menu and a red asterisk, "Expended Minutes" with a numeric input field, "Referred to" with a dropdown menu, and "Comments" with a text area. At the bottom are "Save" and "Cancel" buttons. On the right side, there is a box titled "Services Item Info" containing the text "No predefined item selected."

2. Enter the Client's name. If you arrived at this screen from the Client - Goods and Services List, the client has already been selected.
3. Select the Service from the drop-down list
4. Select the Program(s) this Service is associated with.
5. Select the Reason for Service from the drop-down list
6. Enter how much time, in minutes, it took you to provide this Service
7. Select a place that you Referred the client To as a result of this Service
8. Record some comments about this Service
9. Click **SAVE** when done, or **CANCEL** to go back




Now you're on the **Goods and Services List**

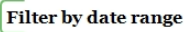
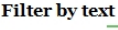
How To: Add a Goods and Services Transaction

Go to the Goods and Services List










1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

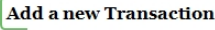
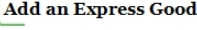
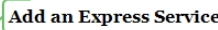
 Now you're on the **Goods and Services List**

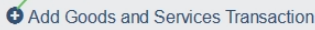
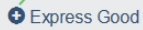

Goods and Services List

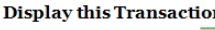
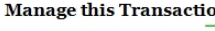
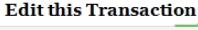
Filter: 1 Week(s)  Filter by text 
Filter items


Show 10 entries

Client Name	Start Date - End Date	Details	Action
Kent, Clark	2017-10-24 - 2017-10-24	Food	  
Rogers, Steve	2017-10-23 - 2017-10-23	<ul style="list-style-type: none">3 Goods / Services• Goods• Services<ul style="list-style-type: none">◦ Advocacy◦ Counseling◦ Financial Aid	  
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	  


  



Add a Goods and Services Transaction

1. Click on the **ADD GOODS AND SERVICES TRANSACTION** button.

 Now you're on the **Client - Add Goods and Services Transaction Screen**

The screenshot shows a web form titled "Client - Add Goods and Services Transaction". At the top left is a green icon of a document with a checkmark. The form has a title bar with a question mark and an information icon. Below the title bar is a button labeled "Add Client". The form contains the following fields and controls:

- Client Name(s)**: A dropdown menu with a red star icon.
- Reason for Service**: A dropdown menu with the text "Select an option" and a red star icon.
- Start Date and Time**: Two input fields, the first with a calendar icon and the second with a clock icon, both with red star icons.
- Program**: A dropdown menu with "Select an option" and plus/minus buttons.
- Case Management Activity**: A dropdown menu with "Select an option".
- Number of Individuals**: A text input field.
- Referred from**: A dropdown menu with "Select an option".
- Referred to**: A dropdown menu with "Select an option".
- Referred by**: A text input field.

At the bottom of the form are two buttons: "Save" (with a house icon) and "Cancel" (with an X icon).

2. Enter the Client's name. If you arrived at this screen from the Client Goods and Services List, the client has already been selected.
3. Select the Reason for Service from the drop-down list.
4. Verify the Start Date and Time. The default value is the current date and time.
5. Select the Program this Goods and Services Transaction is associated with.
6. Select the Case Management Activity this Goods and Services Transaction is associated with.
7. Enter the number of individuals being served by this Goods and Services Transaction.
8. Select the location the Client was Referred From.
9. Select the location the Client is Referred To
10. Enter the name of the person who referred the Client to you
11. Click **SAVE** when done, or **CANCEL** to go back




Now you're on the **Edit Goods and Services Transaction** Screen

How To: Manage an existing Goods and Services Transaction

Go to the Goods and Services List










1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

 Now you're on the **Goods and Services List**

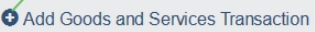
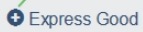
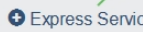
Goods and Services List

Filter: 1 Week(s) Filter by date range Filter by text
Filter items


Show 10 entries

Client Name	Start Date - End Date	Details	Action
Kent, Clark	2017-10-24 - 2017-10-24	Food	  
Rogers, Steve	2017-10-23 - 2017-10-23	<ul style="list-style-type: none">3 Goods / Services• Goods• Services<ul style="list-style-type: none">◦ Advocacy◦ Counseling◦ Financial Aid	  
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	  

Add a new Transaction **Add an Express Good** **Add an Express Service**

Display this Transaction
Manage this Transaction
Edit this Transaction

 You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Manage a Record

1. Click on  for the record you would like to manage

 Now you're on the **Manage** Screen


How To: Add a Good to an Existing Goods and Services Transaction

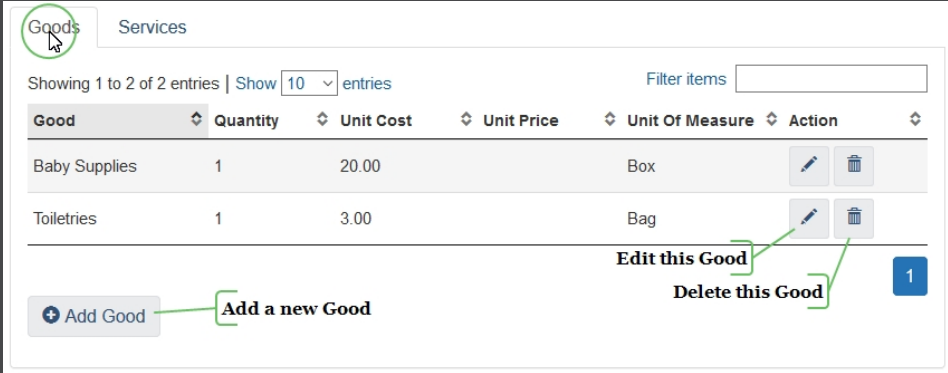
Manage a Goods and Services Transaction

See [Manage an existing Goods and Services Transaction \(on the previous page\)](#).





Go to Goods Tab

1. Click on the **GOODS** tab

 Now you're on the **Goods** Tab



The screenshot shows the 'Goods' tab interface. At the top, there are two tabs: 'Goods' (selected) and 'Services'. Below the tabs, it says 'Showing 1 to 2 of 2 entries | Show 10 entries' and a 'Filter items' search box. A table lists two items:

Good	Quantity	Unit Cost	Unit Price	Unit Of Measure	Action
Baby Supplies	1	20.00		Box	 
Toiletries	1	3.00		Bag	 

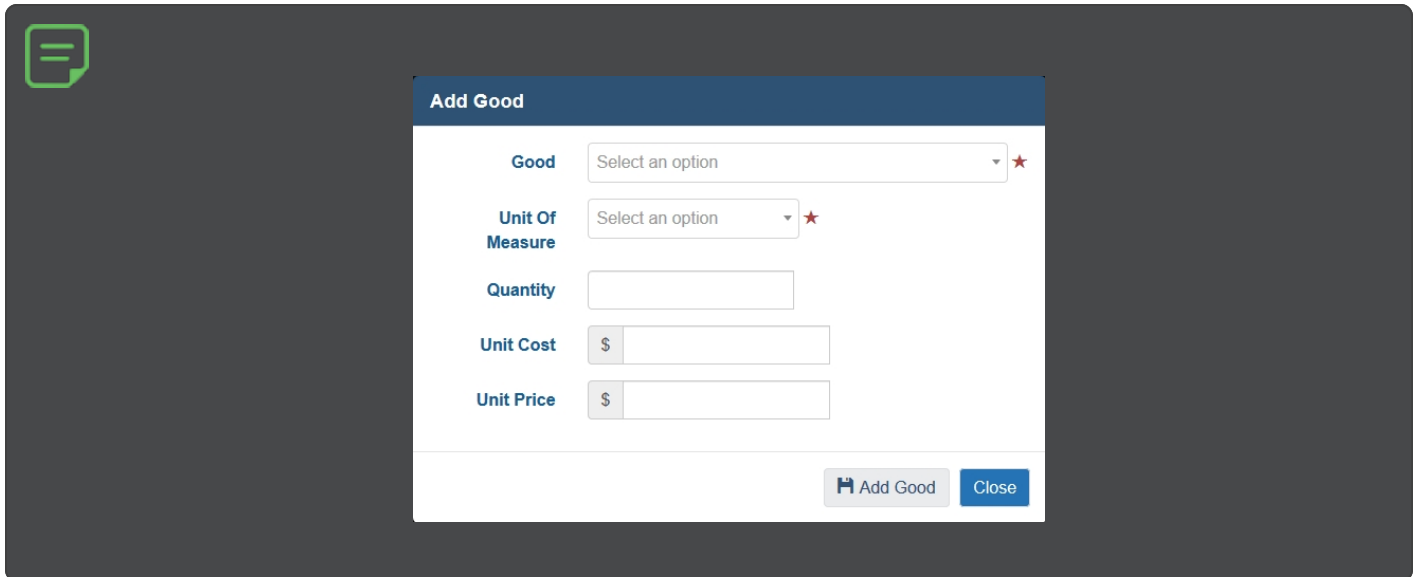
Below the table, there is an 'Add Good' button with a plus icon. A callout box points to it with the text 'Add a new Good'. To the right of the table, there are two callouts: 'Edit this Good' pointing to the edit icon of the first row, and 'Delete this Good' pointing to the delete icon of the first row. A blue square with the number '1' is also visible.

Add a Good

1. Click on the **ADD GOOD** button

 The **Add Good** pop-up will display

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The screenshot shows a software interface for adding a good. The form is titled "Add Good" and is set against a dark grey background. It features a green icon in the top left corner. The form itself is white with a dark blue header. It contains the following fields:

- Good:** A dropdown menu with the text "Select an option" and a red star icon to its right.
- Unit Of Measure:** A dropdown menu with the text "Select an option" and a red star icon to its right.
- Quantity:** A text input field.
- Unit Cost:** A text input field with a "\$" symbol on the left.
- Unit Price:** A text input field with a "\$" symbol on the left.

At the bottom right of the form, there are two buttons: "Add Good" (with a save icon) and "Close".

2. Select the Good from the drop-down list
3. Select the Unit of Measure
4. Optionally, enter the Quantity of Goods provided
5. Optionally, you may enter the Cost of this Good
6. Optionally, you may enter the Price of this Good
7. Click **SAVE** when done

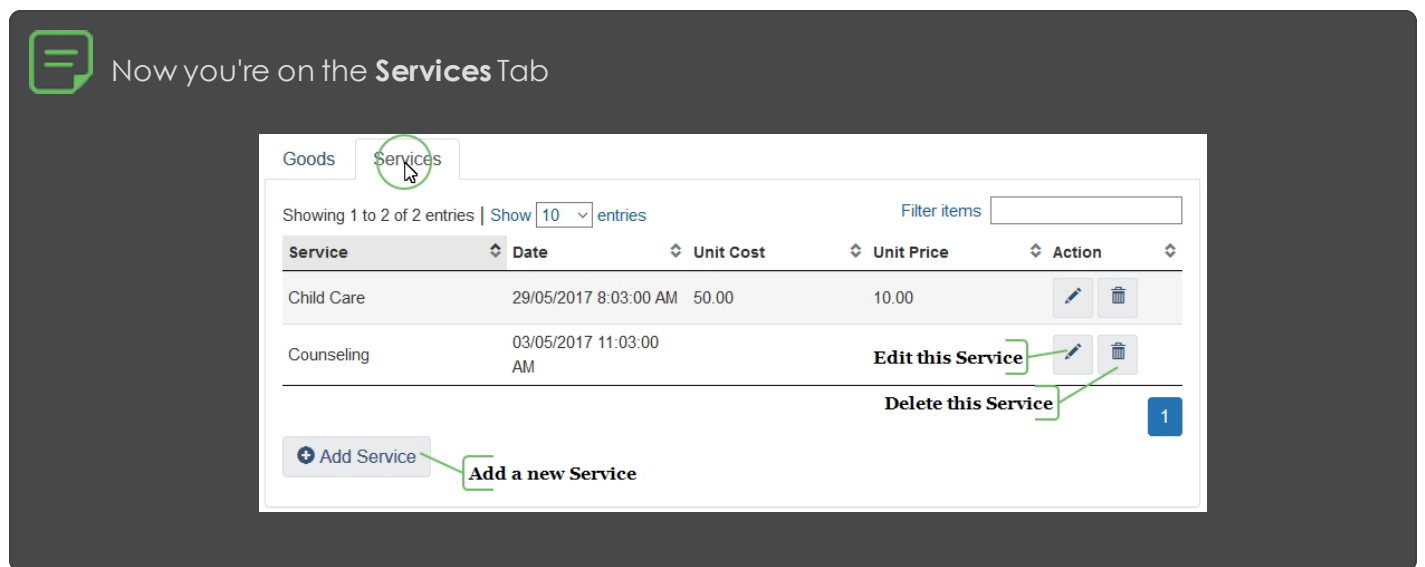
How To: Add a Service to an Existing Goods and Services Transaction

Manage a Goods and Services Transaction

See [Manage an existing Goods and Services Transaction \(on page 37\)](#).

Go to Services Tab

1. Click on the **SERVICES** tab



Add a Service

1. Click on the **ADD SERVICE** button



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The screenshot shows a dark grey background with a green icon in the top left corner. A white modal window titled "Add Service" is centered. The modal contains the following fields:

- Service:** A dropdown menu with the text "Select an option" and a red star icon to its right.
- Start Date and Time:** Two input fields. The top one has a calendar icon, and the bottom one has a clock icon. A red star icon is to the right of the second field.
- End Date and Time:** Two input fields. The top one has a calendar icon, and the bottom one has a clock icon.
- Expended Hours:** A spinner input field.
- Expended Minutes:** A spinner input field.
- Service Cost:** A currency input field with a "\$" symbol on the left.
- Service Price:** A currency input field with a "\$" symbol on the left.


At the bottom right of the modal, there are two buttons: "Add Service" (with a house icon) and "Close".

2. Select the Service from the drop-down list
3. Ensure that the Start Date and Time are correct
4. Optionally, enter an End Date and Time
5. Optionally, you may enter the expended amount of time that was spent delivering this Service
6. Optionally, you may enter the Cost of this Service
7. Optionally, you may enter the Price of this Service
8. Click **SAVE** when done

How To: Close a Goods and Services Transaction

Go to the Goods and Services List










1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

 Now you're on the **Goods and Services List**

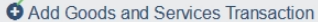
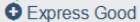
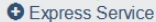
Goods and Services List


Filter: 1 Week(s) Filter by date range Filter by text
Filter items

Show 10 entries


Client Name	Start Date - End Date	Details	Action
Kent, Clark	2017-10-24 - 2017-10-24	Food	  
Rogers, Steve	2017-10-23 - 2017-10-23	<ul style="list-style-type: none">3 Goods / Services• Goods• Services<ul style="list-style-type: none">◦ Advocacy◦ Counseling◦ Financial Aid	Display this Transaction    Manage this Transaction Edit this Transaction
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	  

Add a new Transaction Add an Express Good Add an Express Service

 You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Edit a Record

1. Click on  or  Edit for the record you would like to edit

 Now you're on the **Edit** Screen

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Add an End Date

1. Add a value to the End Date field
2. Click **SAVE** when done



Now you're on the **Display Goods and Services** Screen

CHAPTER 4:

Housing

Placements

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Understanding Housing Placements in HIFIS 4



A Housing Placement in HIFIS 4 is a type of **service record** that indicates that a **Client** is working with a **Caseworker** during a particular **date range** to **find, secure, and retain a particular housing unit**.



A Housing Placement record in HIFIS 4 is very similar to a Housing Loss Prevention record, but a Housing Loss Prevention record excludes the housing search and move-in process.

The Housing Placement module is the logical place to store information regarded to a client's housing search and move-in process. Features of the Housing Placement module include:

- » Opening a Housing Placement to store a related series of information about activities with a Client
- » Assigning a Caseworker to the Client
- » Including other family members in the Housing Placement
- » Selecting the types of housing that the Caseworker and the Client are seeking
- » Setting a target date for securing housing
- » Tracking the status of the Case File
- » Recording unsuccessful Attempts to secure housing
- » Recording the secured housing and date on which housing was secured
- » Recording the client's expected move-in date and actual move-in date
- » Following up after move-in to check if the Client is still housed
- » Recording the rent the Client is paying and any Housing Subsidies they are receiving
- » Attaching files (Documents) to this Housing Placement
- » Custom Table support



Example: Housing First in Practice

Imagine that Jasmine the Caseworker has been assigned to the client Aladdin, who is homeless. Jasmine is a Housing First Caseworker and her top priority is to help Aladdin find appropriate housing. She sits down and meets with Aladdin, and they go through Aladdin's financials. Together, they decide that Aladdin could afford to pay \$500 per month in rent. Aladdin also expresses that he does not want to have a roommate since he already has a pet, and he and Jasmine talk about suitable housing options.



Jasmine creates a Housing Placement and specifies the types of housing that Aladdin is looking for, including Rental at Market Price. She thinks he would be eligible for some programs that would supplement his rent, so she adds Rental at Market Price with Subsidy. She indicates that this Housing Placement is part of the "Housing First" Program.

Next, Jasmine conducts a Housing Unit search to find a list of suitable housing options that meet Aladdin's criteria (at least on paper), that are part of the Housing Unit Inventory her colleague is tasked with maintaining. Together, they go visit some of these units, but none of them pan out. A few of the landlords don't want pets in the building, and some others are too far away that transportation would be an issue for Aladdin. Jasmine records some Housing Placement Attempts, noting what happened and why each unit didn't pan out.

After several attempts, Aladdin and Jasmine talk about his expectations. Turns out, Aladdin probably won't be doing much cooking so Jasmine suggests that a Single Room Occupancy type of housing might be appropriate, and cheaper too. Aladdin agrees. Jasmine modifies Aladdin's housing unit criteria in the Housing Placement and searches again for more Housing Units in the inventory, but they're still not able to find a housing match.

Finally, Aladdin finds out that his cousin's neighbour, Kassim, has a room for rent. Jasmine and Aladdin go to check it out and Aladdin and Kassim agree to an arrangement, but it's more than Aladdin would have liked. While they don't sign a formal lease agreement, Jasmine insists that something official is in place so Aladdin doesn't get taken advantage of later. She provides a simple agreement, and writes in the rent amount of \$550, and Aladdin and Kassim both sign it.

In the Housing Placement, Jasmine Adds and Secures a Housing Unit, indicating that Aladdin is moving in to a unit that is not part of the Housing Unit Inventory. She indicates that Aladdin is expected to move in next Monday. She also scans and uploads a copy of the agreement Aladdin and Kassim signed.

On Monday, Aladdin moves in as planned. Jasmine also indicates that the Housing Placement status is now Moved In. She also schedules a Follow-up for Wednesday.

Because Aladdin is paying more than he can afford for rent, Jasmine helps him to access a special local fund to make his housing more affordable. She enters in the Housing Placement that Aladdin is now receiving a Housing Subsidy in the amount of \$50/month from the "Housing First Flex Fund" Program.

On Wednesday, Jasmine returns to Aladdin's unit and checks in on things. There are some challenges, but Jasmine and Aladdin work through them together. Jasmine enters a Follow-up in the Housing Placement to indicate that Aladdin is still housed, and records some notes. She then schedules her next Follow-up.



Jasmine can continue with this process of conducting a Follow-up and scheduling the next one until either Aladdin leaves that housing unit, or until Jasmine is no longer working to support Aladdin in his housing. In either of these cases, she would conduct a Final Follow-up to close the Housing Placement.

Housing Placement List

The **Housing Placement List** is reached via the Front Desk Menu by clicking on **HOUSING ► HOUSING PLACEMENT**. This page shows a list of all Housing Placements opened by the active Service Provider, which can be filtered to only show a sub-section of all Housing Placements.

Housing Placement List

Filter by housing placement status
Active All

Filter by date range
Filter: All

List Housing Loss Prevention Records with scheduled Follow-Up Dates that are past or coming soon
Past Due / Upcoming Follow-ups (1) Past Target Date (1) Past Expected Move In Date (1)

List Housing Placements that are past their Target Date

List Housing Placements that are past their scheduled Move-In Date

Filter by text
Filter items

Show 10 entries

Client Name	Search Started Date	Housing Type(s) Sought	Caseworker	Status	Action
Crow, Scare	2018-07-01	3 - Housing Type(s) Sought	Smith, Sam	Housing Secured Expected Move In Date: 2018-10-01 ⚠ Upcoming Expected Move In Date!	⚙️ ✎️ 🔍
Gale, Dorothy	2018-01-15	Supported / Supportive Housing	Ryder, Ali	Housing Not Secured Target Date: 2018-07-01 ⚠ Past Target Date!	⚙️ ✎️ 🔍
Lion, Cowardly	2017-03-22	Rental at Market Price	Witch, Good	Moved Into Housing Next Scheduled Follow-up: 2018-05-11	⚙️ ✎️
Woodman, Tin	2018-06-12	Rental at Market Price with Rent Subsidy	of Oz, Wizard	Housing Secured Expected Move In Date: 2018-09-01 ⚠ Past Expected Move In Date!	⚙️ ✎️ 🔍

Add new Housing Placement
+ Add Housing Placement

Manage this Housing Placement
Edit this Housing Placement
Start a Housing Search for this Housing Placement

1


Client - Housing Placement List

The **Client - Housing Placement List** is reached via the Client Management Menu by clicking on Housing Placement. This page shows a list of all Housing Placements belonging to the active Client, which can be filtered to only show a sub-section of all Housing Placements.

The Client - Housing Placement List shows all Housing Placements belonging to the active Client, including ones opened by other Service Providers. Therefore, the information on this page (Caseworker, Service Provider, Goal, Status, and Target Date) are shared with Users at other Service Providers. However Users can only Manage or Edit Housing Placements that have been opened by Service Providers that the User has been granted appropriate Rights to.

Client Information ▾

Client Management ▾



Dorothy Gale

Consent Status	Active
File Number	000000012
Current Stay	Wonderland Shelter - Great Hall : Bed 109
Gender	Female
Date of Birth	1980-12-06 (37)
Family	Yes

Housing Placement List

Active All **Filter by housing placement status**

Filter: All ▾ **Filter by date range**

Show 10 ▾ entries **Filter by text**

Filter items

Service Provider	Search Started Date	Housing Type(s) Sought	Caseworker	Status	Action
ACRE Consulting	2018-01-15	Supported / Supportive Housing	Ryder, Ali	Housing Not Secured Target Date: 2018-07-01 ▲ Past Target Date!	⚙️ ✎️ 🔍

Manage this Housing Placement

Start a Housing Search for this Housing Placement

Edit this Housing Placement

➕ Add Housing Placement

Add new Housing Placement

How To: Add a Housing Placement

Go to the Housing Placement List

1. Click on the **FRONT DESK MENU**
2. Click on **HOUSING**
3. Click on **HOUSING PLACEMENTS**



Now you're on the [Housing Placement List \(on page 48\)](#)



Take note of the Clients who already have active Housing Placements. Try to pick a different client in the next step.

Add Housing Placement

1. Click on the **ADD HOUSING PLACEMENT** button



Now you're on the **Add Housing Placement** Screen

Add Housing Placement [?] [↓]

Client Name [dropdown] ★

Caseworker [Select an option dropdown] ★

Housing Type(s) Sought [Select an option text input] + - ★

Search Started Date [calendar icon] ★

Target Date [calendar icon]

Program [Select an option dropdown] + -

[Start Housing Placement] [Cancel]

2. Select a client. Note: if you arrived at this page from the **Client - Housing Placements** list, the client has already been selected.



Make sure the client does not have any existing, active Housing Placements. Otherwise, you'll get an error later. Clients can only have one active Housing Placement at a time. If they do have an existing Housing Placement, open a new client file (see [Open a Client File \(on page 1\)](#)), add a new client (see [Add a Client \(on page 1\)](#)), or close the existing Housing Placement first (see [Follow Up and Close File \(on page 70\)](#)).

3. Select the caseworker working with this client to find housing.
4. Select the Housing Type(s) that the client is searching for
5. Enter the date that the client started searching for housing
6. Enter a Target Date that the client aims to have housing by
7. Select a Program(s) for this housing placement
8. Click on the **START HOUSING PLACEMENT** button



Now you're on the **Housing Placement Details** screen with the Housing Placement Status of Housing Not Secured.

How To: Manage a Housing Placement

Go to the Housing Placement List

1. Click on the **FRONT DESK MENU**
2. Click on **HOUSING**
3. Click on **HOUSING PLACEMENTS**



Now you're on the [Housing Placement List \(on page 48\)](#)

Manage a Record

1. Click on  for the record you would like to manage



Now you're on the **Manage** Screen

How To: Add an Unsuccessful Housing Placement Attempt to an Existing Housing Placement

Manage a Housing Placement

See [Manage a Housing Placement \(on the previous page\)](#)

Go to [Attempts Tab](#)

1. Click on the **ATTEMPTS** tab

Now you're on the **Attempts** tab

Date Attempted	Caseworker	Reason Housing Not Secured	Comments
02/09/2016	Ryder, Ali	Housing not Available Within Maximum Shelter Allowance	Looking outside the downtown core next time
01/09/2016	Ryder, Ali	Client not Interested Because of Standard of Rooms / Housing Available	

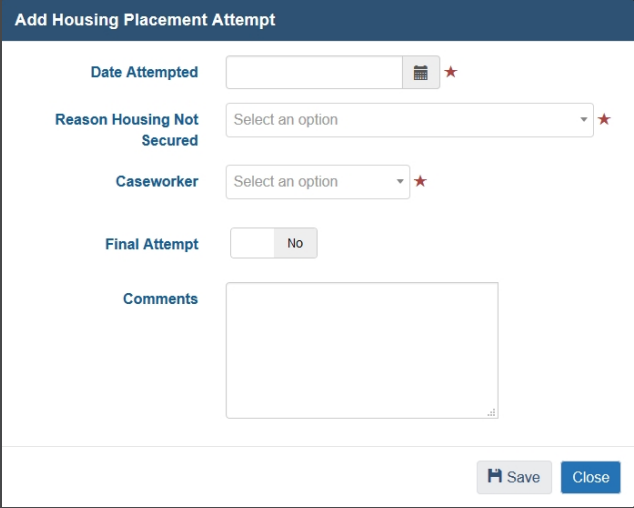
Add a new Housing Placement Attempt

Add Housing Placement Attempt

1. Click on the **ADD HOUSING PLACEMENT ATTEMPT** button

Now you're on **Add Housing Placement Attempt** pop-up

County of Simcoe
Training Manual



The screenshot shows a web form titled "Add Housing Placement Attempt". The form contains the following fields and controls:

- Date Attempted:** A date input field with a calendar icon and a red star.
- Reason Housing Not Secured:** A dropdown menu with "Select an option" and a red star.
- Caseworker:** A dropdown menu with "Select an option" and a red star.
- Final Attempt:** A toggle switch currently set to "No".
- Comments:** A large text area for entering notes.
- Buttons:** "Save" and "Close" buttons at the bottom right.

2. Ensure that the Date Attempted is accurate
3. Select the most appropriate Reason that Housing was Not Secured
4. Select the caseworker working with this client on this housing attempt
5. If, as a result of this Housing Placement Attempt, this Housing Placement will be ended, toggle Final Attempt to "Yes." Otherwise, leave it as "No"
6. Optionally, enter Comments
7. Click on the **SAVE** button

How To: Search for an Existing Housing Unit and Record an Unsuccessful Attempt



This function is used to place a Client in a Housing Unit that already exists in the **Housing Unit List**. To place a Client in a new Housing Unit, see [Add and Secure Housing for an Existing Housing Placement \(on page 57\)](#).

Manage a Housing Placement

See [Manage a Housing Placement \(on page 52\)](#)

Search for Housing

1. Click on the **NEW HOUSING SEARCH** button.

Now you're on Housing Unit Search

Housing Unit Search

Family Members N/A **Search Started Date** 01/10/2016
Housing Type(s) Sought [View All](#) **Target Date** 31/10/2016
Caseworker [Lee, Stan](#) **Service Provider** House of Hope
Program

[Filter Options](#) [Map View](#)

Showing 1 to 4 of 4 entries (filtered from 11 total entries) | Show entries

Service Providers	Address	Housing Type	Unit Status	Rent/Month	Properties	Action
House of Hope	1 Blue St	Co-op Housing	Excellent 29/09/2016			
House of Hope	2 blah	Co-op Housing	Excellent 05/10/2016			
House of Hope	100 McAthur Ave	Co-op Housing	Excellent 20/10/2016	\$350.00		
House of Hope	121 gth	Co-op Housing	Good 20/10/2016			

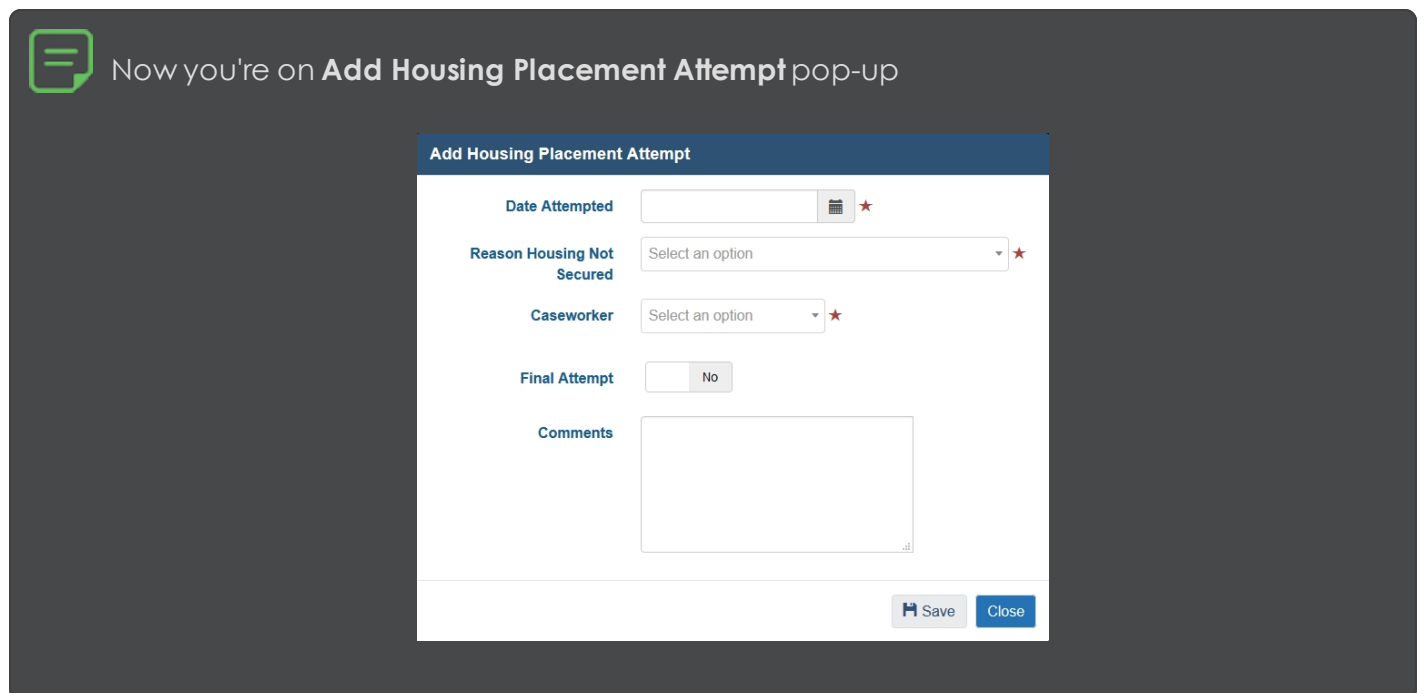
[Add Housing Placement Attempt](#) [Back](#)

Training Manual

2. There will be a list of Housing Units that match the Housing Type(s) Sought
3. Click on the **FILTER OPTIONS** button to change the housing types displayed
4. In the sidebar that appears, click the Select All button next to Housing Type(s) Sought.
5. Click on the **APPLY FILTERS** button
6. The list of Housing Units should change to reflect the new options


Add Housing Placement Attempt

1. Click on the **ADD HOUSING PLACEMENT ATTEMPT** button



Now you're on **Add Housing Placement Attempt** pop-up

Add Housing Placement Attempt

Date Attempted  ★

Reason Housing Not Secured ▼ ★

Caseworker ▼ ★

Final Attempt No

Comments

2. Ensure that the Date Attempted is accurate
3. Select the most appropriate Reason that Housing was Not Secured
4. Select the caseworker working with this client on this housing attempt
5. If, as a result of this Housing Placement Attempt, this Housing Placement will be ended, toggle Final Attempt to "Yes." Otherwise, leave it as "No"
6. Optionally, enter Comments
7. Click on the **SAVE** button

How To: Add and Secure Housing for an Existing Housing Placement



This function is used to place a Client in a Housing Unit that does not yet exist in the **Housing Unit List**. To place a Client in an existing Housing Unit, see [Search for and Secure an Existing Housing Unit \(on page 59\)](#).

Manage a Housing Placement

See [Manage a Housing Placement \(on page 52\)](#)

Add and Secure Housing Unit

1. Click on the **ADD AND SECURE A HOUSING UNIT** button



Now you're on the **Add Housing Unit** pop-up

Add Housing Unit

Housing Type Select an option ★

Status Select an option ★

Address Line 1 ★

Country Canada x ★

Province/Territory Select an option

City Select an option

Postal Code

Expected Move In Date 2016-10-26

Save and secure Close

2. Select the Housing Type
3. Select the Status (what condition is the unit in?)
4. Enter the Address, Country, Province/Territory, and City

5. Enter the Expected Move In Date
6. Click on the **SAVE AND SECURE** button



Now you're on the **Housing Placement Details** screen with the Housing Placement Status of Housing Secured.

How To: Search for and Secure an Existing Housing Unit



This function is used to place a Client in a Housing Unit that already exists in the **Housing Unit List**. To place a Client in a new Housing Unit, see [Add and Secure Housing for an Existing Housing Placement \(on page 57\)](#).

Manage a Housing Placement

See [Manage a Housing Placement \(on page 52\)](#)

Search for Housing

1. Click on the **NEW HOUSING SEARCH** button.

Now you're on Housing Unit Search

Housing Unit Search

?
i

Family Members N/A

Housing Type(s) Sought [View All](#)

Caseworker [Lee, Stan](#)

Program

Search Started Date 01/10/2016

Target Date 31/10/2016

Service Provider House of Hope

▼ Filter Options
Map View

Showing 1 to 4 of 4 entries (filtered from 11 total entries) | Show 10 entries

Service Providers	Address	Housing Type	Unit Status	Rent/Month	Properties	Action
House of Hope	1 Blue St	Co-op Housing	Excellent 29/09/2016			
House of Hope	2 blah	Co-op Housing	Excellent 05/10/2016			
House of Hope	100 McAthur Ave	Co-op Housing	Excellent 20/10/2016	\$350.00		
House of Hope	121 gth	Co-op Housing	Good 20/10/2016			

1


Add Housing Placement Attempt
 Back

Training Manual


2. There will be a list of Housing Units that match the Housing Type(s) Sought
3. Click on the **FILTER OPTIONS** button to change the housing types displayed
4. In the sidebar that appears, click the Select All button next to Housing Type(s) Sought.
5. Click on the **APPLY FILTERS** button
6. The list of Housing Units should change to reflect the new options


Secure Housing Unit



1. Click on the  button next to the Housing Unit you'd like to secure for your Client

 Now you're on the **Secure Unit** pop-up


Secure Unit

Housing Secured Date  ★

Expected Move In Date  ★

 Secure Unit 

2. Enter the Housing Secured Date
3. Enter the Expected Move In Date
4. Click on the **SECURE UNIT** button

 Now you're on the **Housing Placement Details** screen with the Housing Placement Status of Housing Secured.

How To: Add a Document to a Housing Placement

Manage a Housing Placement

See [Manage a Housing Placement \(on page 52\)](#)

Go to Documents Tab

1. Click on the **DOCUMENTS** tab

Now you're on the **Documents** tab

Attempts **Documents**

Showing 1 to 2 of 2 entries | Show entries

Filter by text
Filter items

Name	Description	Date Created
Lease	Copy of the Lease document	23/01/2017
Housing Worksheet		23/01/2017

Add a new Housing Placement Document

Add Document

1. Click on the **ADD DOCUMENT** button

Now you're on the **Add Document** pop-up

Add Document

File to Upload No file selected. ★

Name

Confidential

Description

Training Manual

2. Click **BROWSE...**
 - a. In the File Upload window, navigate to and select the file you wish to upload from your computer
 - b. Click **OPEN**
 - c. The File Upload window will close and your file name will be listed in the Attachments field
3. Optionally, add a name for this Document
4. Indicate whether this Document is Confidential
5. Optionally, record a description about this Document
6. Click **SAVE** when done

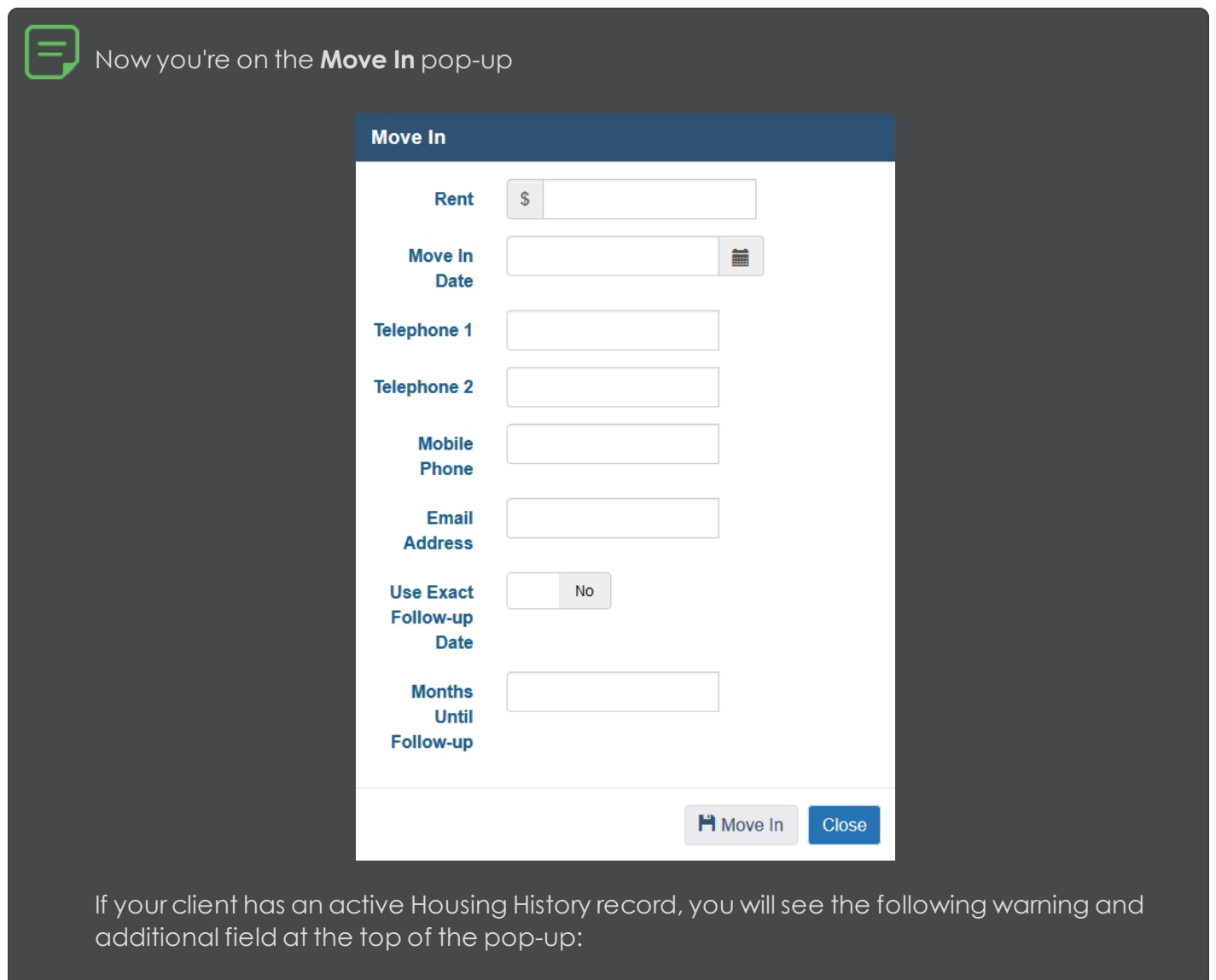
How To: Move Into Secured Unit

Manage a Housing Placement

See [Manage a Housing Placement \(on page 52\)](#)

Move In

1. Click on the **MOVE IN** button



Now you're on the **Move In** pop-up

Move In

Rent

Move In Date

Telephone 1

Telephone 2

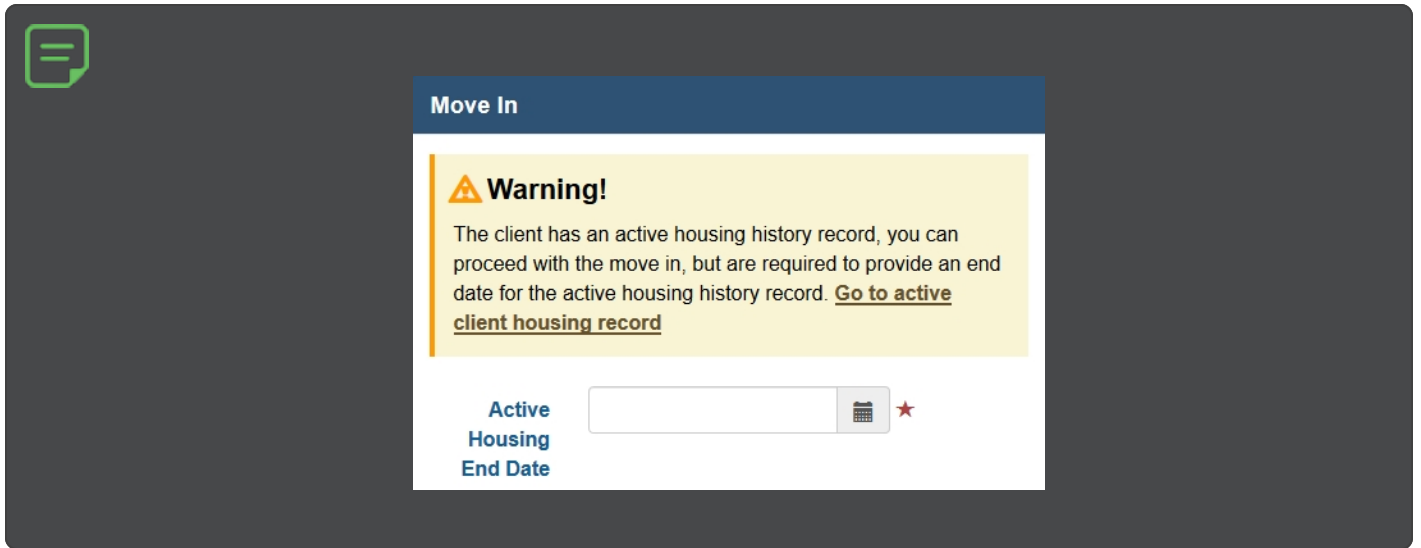
Mobile Phone

Email Address

Use Exact Follow-up Date No

Months Until Follow-up

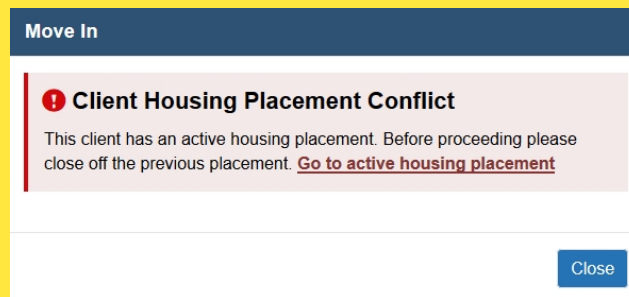
If your client has an active Housing History record, you will see the following warning and additional field at the top of the pop-up:



2. If your client has an active Housing History, specify the End Date (move-out date) for the client's current housing
3. Enter the rent
4. Select the Move In Date
5. Optionally, enter the contact information (Telephone 1, Telephone 2, Mobile Phone, and/or Email Address) for the Housing Unit being moved into
6. Specify the number of Months Until Follow Up
7. Click on the **MOVE IN** button



If the client already has an active Housing Placement, instead of saving, you will get a pop-up telling you that the client already has an active Housing Placement. It doesn't make sense for two case files to exist that both indicate they are helping the same client find different housing. At this point, you must close the existing Housing Placement before proceeding (see [Follow Up and Close File \(on page 70\)](#)).





Now you're on the **Housing Placement Details** screen with the Housing Placement Status of Moved Into Housing.

How To: Add a Housing Subsidy to a Housing Placement

Manage a Housing Placement

See [Manage a Housing Placement \(on page 52\)](#)

Go to Subsidies Tab

1. Click on the **SUBSIDIES** tab

Now you're on the **Housing Subsidies** Tab

Follow-ups Attempts **Subsidies** Documents

Showing 1 to 1 of 1 entries | Show 10 entries

Filter by text
Filter items

Program Name	Service Provider	Amount	Start Date and Time	End Date and Time	Action
Housing First	House of Hope	200.00	01/12/2016		Delete this Subsidy

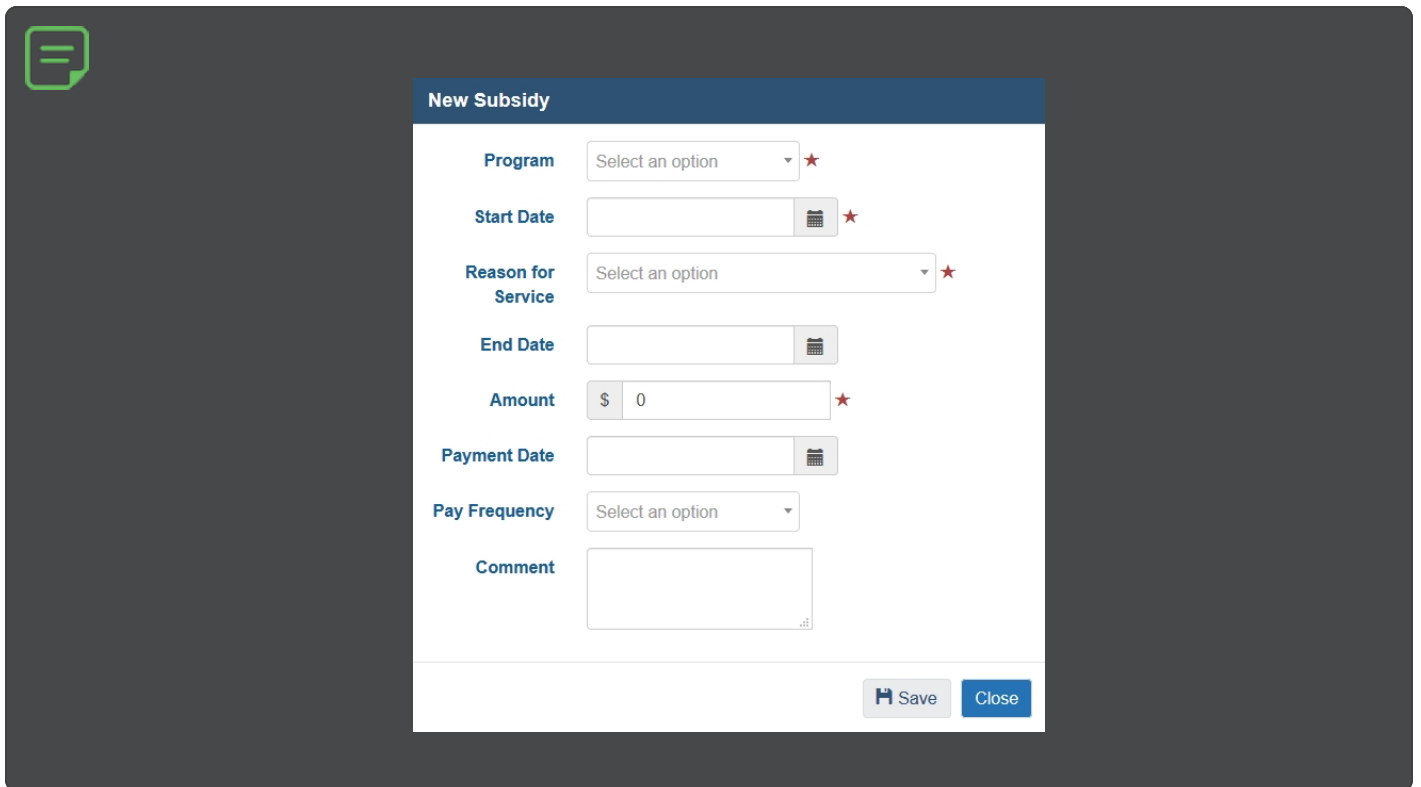
+ New Subsidy **Add a new Housing Subsidy**

Add a Housing Subsidy

1. Click on the **NEW SUBSIDY** button

Now you're on the **New Subsidy** pop-up

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The screenshot shows a 'New Subsidy' form with the following fields:

- Program:** A dropdown menu with the text 'Select an option' and a red star icon.
- Start Date:** A date input field with a calendar icon and a red star icon.
- Reason for Service:** A dropdown menu with the text 'Select an option' and a red star icon.
- End Date:** A date input field with a calendar icon.
- Amount:** A text input field with a dollar sign, the number '0', and a red star icon.
- Payment Date:** A date input field with a calendar icon.
- Pay Frequency:** A dropdown menu with the text 'Select an option'.
- Comment:** A text area with a small icon in the bottom right corner.

At the bottom right of the form, there are two buttons: 'Save' and 'Close'.

2. Select the Program
3. Enter the Start Date on which the Housing Subsidy begins
4. Enter the Reason for this Housing Subsidy
5. If the Housing Subsidy is time-limited, or in the past, add an End Date. Otherwise, leave it blank.
6. Enter the dollar amount for the monthly Housing Subsidy.
7. Optionally, enter the payment date
8. Optionally, enter the pay frequency
9. Click **SAVE** when done

How To: Follow Up on Housing Placement and schedule another Follow Up

Manage a Housing Placement

See [Manage a Housing Placement \(on page 52\)](#)

[Go to Follow-ups Tab](#)

1. Click on the **FOLLOW-UPS** tab

Now you're on **Follow-Ups** Tab

Follow-ups Subsidies Documents

Filter by text

Filter items

Showing 1 to 2 of 2 entries | Show 10 entries

Follow-up Date	Service Provider	Caseworker	Months Elapsed	Action
2018-07-03	ACRE Consulting	of Oz, Wizard	1	
2018-08-07	ACRE Consulting	of Oz, Wizard	2	

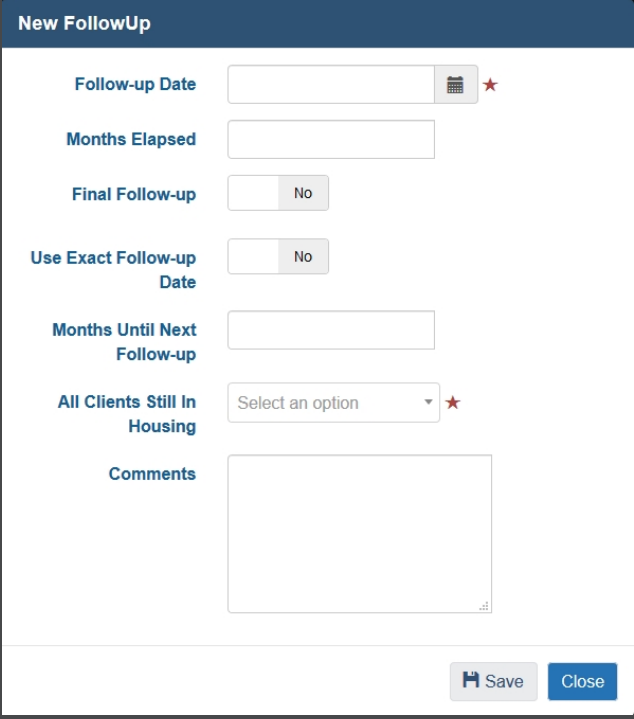
+ Add Follow-up **Add a new Housing Loss Prevention Follow-up**

[Follow Up and Schedule Next Follow Up](#)

1. Click on the **ADD FOLLOW-UP** button

Now you're on the **Add Housing Placement Follow-up** pop-up

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The screenshot shows a 'New FollowUp' form with the following fields and controls:

- Follow-up Date:** A date picker field with a calendar icon and a red star.
- Months Elapsed:** A text input field.
- Final Follow-up:** A toggle switch set to 'No'.
- Use Exact Follow-up Date:** A toggle switch set to 'No'.
- Months Until Next Follow-up:** A text input field.
- All Clients Still In Housing:** A dropdown menu with 'Select an option' and a red star.
- Comments:** A large text area for entering notes.
- Buttons:** 'Save' and 'Close' buttons at the bottom right.

2. Select the date of the Follow-Up
3. Specify the number of months elapsed since move-in
4. Toggle Final Follow-up to "No"
5. Either select a date for the next follow up, or enter the number of months until the next follow up
6. Specify whether All Clients are Still in Housing
7. If not all clients are still in the housing unit, specify which clients have left, why they left, and are they housed elsewhere
8. Optionally, add comments
9. Click on the **SAVE** button



Now you're on **Client Housing Placement List**

How To: Follow Up and Close File

Manage a Housing Placement

See [Manage a Housing Placement \(on page 52\)](#)

[Go to Follow-ups Tab](#)

1. Click on the **FOLLOW-UPS** tab

Now you're on **Follow-Ups** Tab

Follow-ups Subsidies Documents

Filter by text

Showing 1 to 2 of 2 entries | Show 10 entries

Follow-up Date	Service Provider	Caseworker	Months Elapsed	Action
2018-07-03	ACRE Consulting	of Oz, Wizard	1	
2018-08-07	ACRE Consulting	of Oz, Wizard	2	

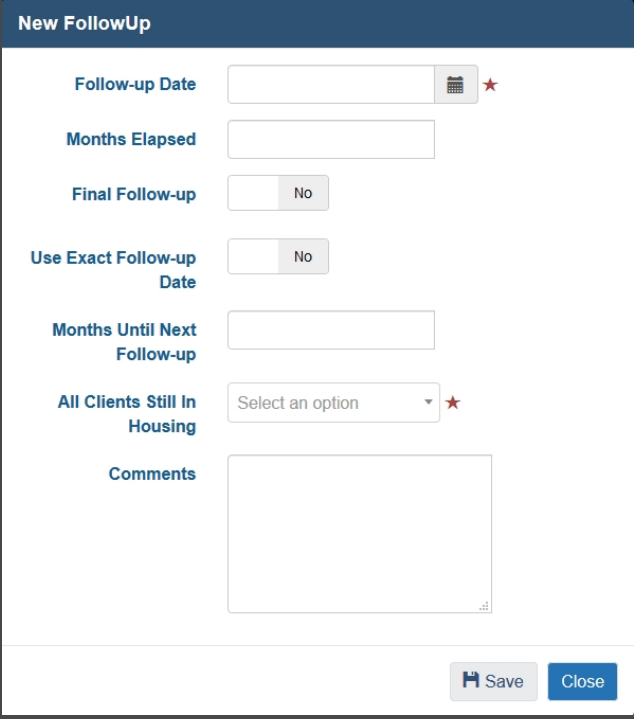
+ Add Follow-up [Add a new Housing Loss Prevention Follow-up](#)

Follow Up and End Housing Placement

1. Click on the **ADD FOLLOW-UP** button

Now you're on the **New Follow-up** pop-up

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The screenshot shows a 'New FollowUp' form with the following fields and controls:

- Follow-up Date:** A date picker field with a calendar icon and a red star.
- Months Elapsed:** A text input field.
- Final Follow-up:** A toggle switch currently set to 'No'.
- Use Exact Follow-up Date:** A toggle switch currently set to 'No'.
- Months Until Next Follow-up:** A text input field.
- All Clients Still In Housing:** A dropdown menu with 'Select an option' and a red star.
- Comments:** A large text area for entering notes.
- Buttons:** 'Save' and 'Close' buttons at the bottom right.

2. Select the Date of the Follow-Up. This is the date that you checked in on the Client.
3. Enter the number of Months Elapsed since the Client moved in.
4. Toggle Final Follow-up to "Yes." This will close the file for the Housing Placement.
5. Specify whether All Clients are Still in Housing.
 - a. If not all clients are still in the housing unit, specify which clients have left, why they left, and are they housed elsewhere.
6. Enter some Comments about this Follow-up.
7. Click on the **SAVE** button



Now you're on **Client - Housing Placement List**

CHAPTER 5:

Housing Units

The Housing Units module is a repository of all the Housing Units that are available for use in the Housing Placements module (and also includes Housing Units that are temporarily unavailable).

With the Housing Units module, users can:

- » Maintain an inventory of what Housing Units are available in the community
- » Keep a list of Landlords in the community, and their contact information
- » Record when Maintenance was performed on Housing Units that you manage



Maintaining a Housing Unit inventory is optional. Users can complete a Housing Placement and add a new Housing Unit on the fly. It is not necessary to pre-populate the Housing Units List prior to use.

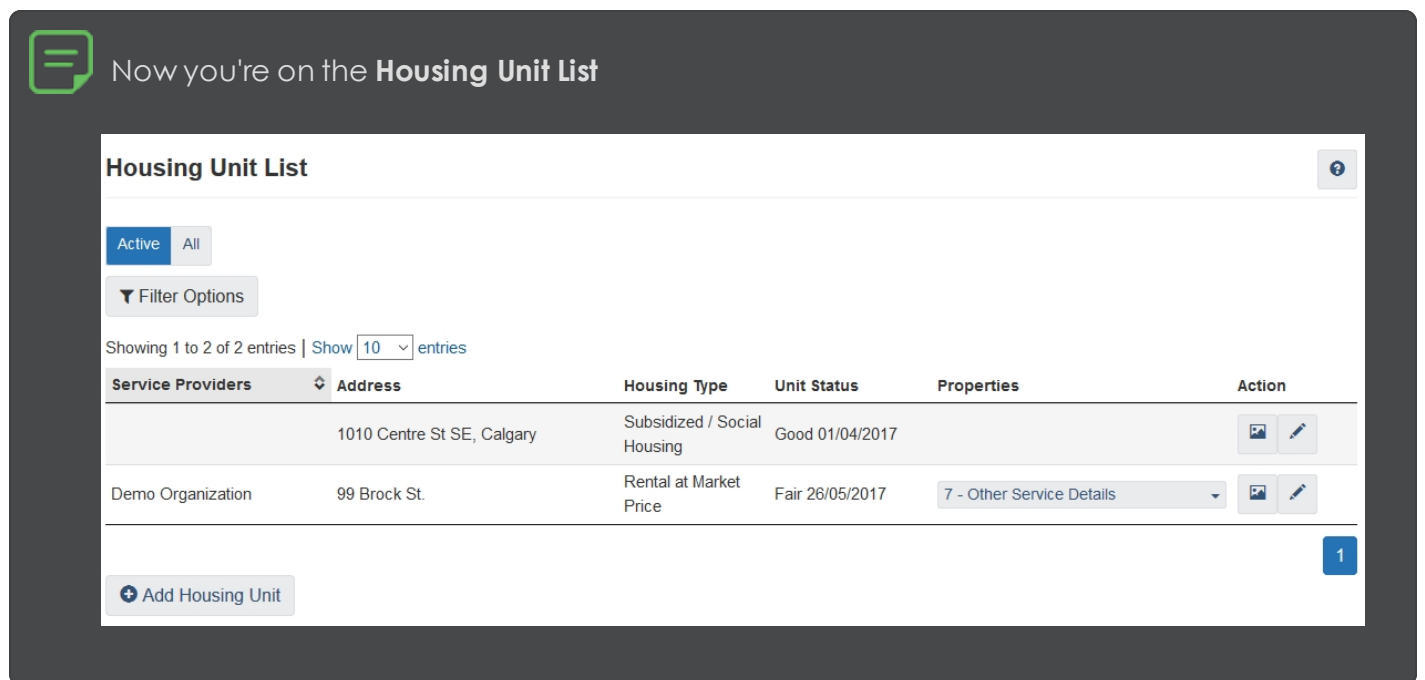
Chapter Contents

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How To: Edit a Housing Unit	79
How To: Add a Maintenance Record to a Housing Unit	80
How To: Add Photos of a Housing Unit	83
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How To: Browse Housing Units

Go to the Housing Unit List

1. Click on the **FRONT DESK MENU**
2. Click on **HOUSING PLACEMENT**
3. Click on **HOUSING UNIT**







Now you're on the **Housing Unit List**

Housing Unit List

Active All

Filter Options

Showing 1 to 2 of 2 entries | Show 10 entries

Service Providers	Address	Housing Type	Unit Status	Properties	Action
	1010 Centre St SE, Calgary	Subsidized / Social Housing	Good 01/04/2017		 
Demo Organization	99 Brock St.	Rental at Market Price	Fair 26/05/2017	7 - Other Service Details	 

+ Add Housing Unit

1

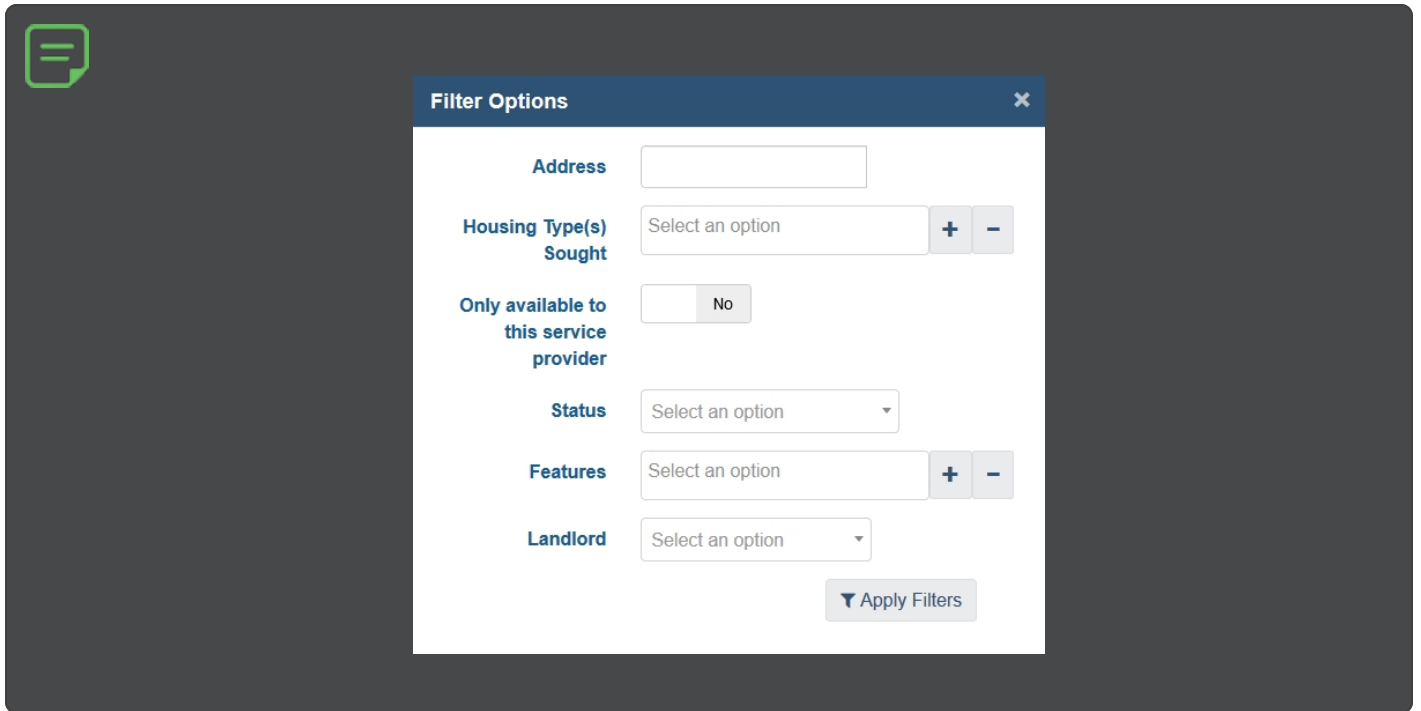
Filter Housing Units

1. Click on the **FILTER OPTIONS** button



Now you'll see the **Filter Options** pop-up

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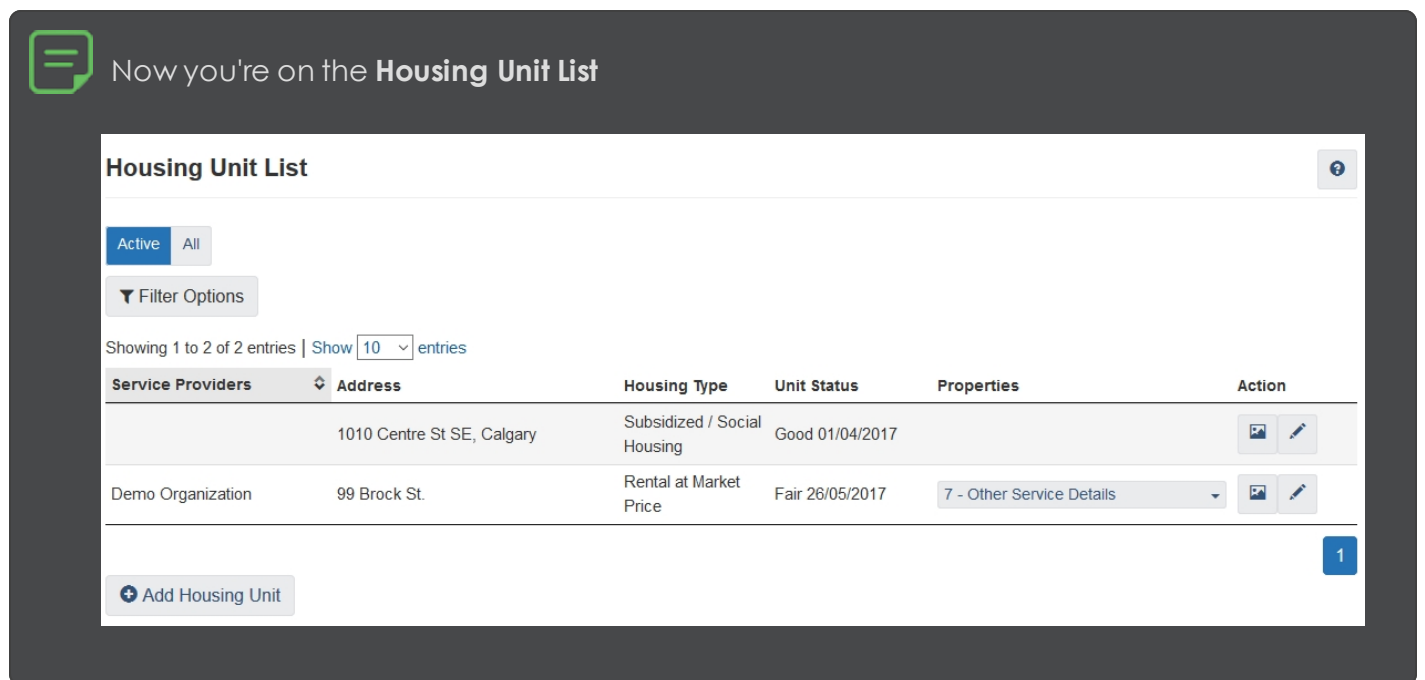


2. Use the fields to enter the search parameters for the Housing Unit(s) you would like to display
3. Click **APPLY FILTERS** when done

How To: Add a Housing Unit

Go to the Housing Unit List

1. Click on the **FRONT DESK MENU**
2. Click on **HOUSING PLACEMENT**
3. Click on **HOUSING UNIT**

A screenshot of the 'Housing Unit List' interface. At the top left, there is a green icon of a document with a checkmark and the text 'Now you're on the Housing Unit List'. The main content area is titled 'Housing Unit List' and includes a filter section with 'Active' and 'All' tabs, and a 'Filter Options' button. Below this, it says 'Showing 1 to 2 of 2 entries | Show 10 entries'. A table with columns 'Service Providers', 'Address', 'Housing Type', 'Unit Status', 'Properties', and 'Action' displays two rows of data. The first row shows '1010 Centre St SE, Calgary' for 'Subsidized / Social Housing' with a status of 'Good 01/04/2017'. The second row shows '99 Brock St.' for 'Rental at Market Price' with a status of 'Fair 26/05/2017'. At the bottom left is an 'Add Housing Unit' button, and at the bottom right is a blue square with the number '1'.





Now you're on the **Housing Unit List**

Housing Unit List

Active All

Filter Options

Showing 1 to 2 of 2 entries | Show 10 entries

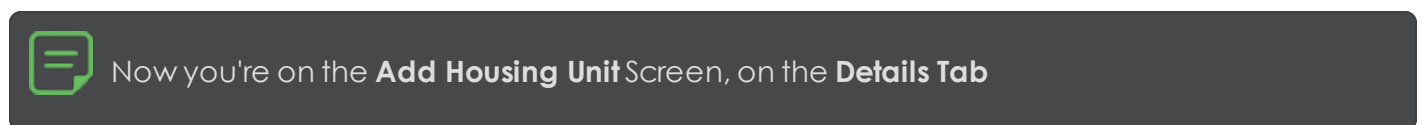
Service Providers	Address	Housing Type	Unit Status	Properties	Action
	1010 Centre St SE, Calgary	Subsidized / Social Housing	Good 01/04/2017		 
Demo Organization	99 Brock St.	Rental at Market Price	Fair 26/05/2017	7 - Other Service Details	 

+ Add Housing Unit

1

Add a Housing Unit

1. Click on the **ADD HOUSING UNIT** button

A dark grey banner with a green icon of a document with a checkmark on the left and the text 'Now you're on the Add Housing Unit Screen, on the Details Tab' on the right.

Now you're on the **Add Housing Unit** Screen, on the **Details Tab**

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The screenshot shows a web application interface for adding a housing unit. The form is titled "Add Housing Unit" and has two tabs: "Details" (selected) and "Address". The form contains the following fields and controls:

- Housing Type:** A dropdown menu with "Select an option" and a red star icon.
- Status:** A dropdown menu with "Select an option" and a red star icon.
- Status Date:** A date input field with a calendar icon.
- Occupancy Status:** A dropdown menu with "Select an option".
- Occupancy Status Date:** A date input field with a calendar icon.
- Occupancy Comment:** A text area.
- Landlord:** A dropdown menu with "Select an option".
- Service Provider:** A dropdown menu with "Select an option".
- Features:** A dropdown menu with "Select an option" and plus/minus buttons.
- Shareable:** A toggle switch currently set to "No".
- Area:** Two input fields for area, one with a "ft²" unit and one with an "m²" unit.
- Year Built:** An input field.
- Bedrooms:** An input field.
- Floor:** An input field.
- Floor Number:** An input field.
- Rent:** An input field with a "\$" symbol and a "/ Month" label.
- Active:** A toggle switch currently set to "Yes".
- Comments:** A text area.

At the bottom of the form, there are three buttons: "Save", "Cancel", and "Add Person".

2. Select Housing Type
3. For Status, select the condition the Unit is in
4. For Status Date, select the date on which the condition was last assessed
5. For Occupancy Status, indicate whether the Unit is currently available or currently occupied
6. For Occupancy Status Date, indicate the date on which the Occupancy Status was last assessed
7. Optionally, add a comment about the Occupancy Status

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8. Optionally, select a Landlord for this Unit
9. If this Housing Unit belongs to one Service Provider in particular (i.e. supportive housing), select that service provider in the Service Provider field
10. Optionally, select which features this Unit includes
11. Indicate whether this Unit can be shared with other Clients
12. Optionally, indicate the Area of the Unit
13. Optionally, record the Year the Unit was built
14. Optionally, record the number of Bedrooms in this Unit
15. Optionally, record the number of Floors of the building in the Floor field
16. Optionally, record the Floor Number that the Unit is located on
17. Optionally, enter the full asking amount of rent for the unit. For example, if the landlord is asking for \$600, enter that value.
18. Indicate whether this Unit listing is currently Active
19. Optionally, add additional notes about this Unit
20. Click on the **ADDRESS TAB**



Now you're on the **Add Housing Unit** Screen, on the **Address Tab**

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Add Housing Unit

Details ★ Address ★

Place Name

Address Line 1 ★

Address Line 2

Unit/Apartment Number

Country Canada x v ★

Province/Territory Select an option v

City Select an option v

Postal Code

Geographic Region Select an option + -

Save Cancel Add Person

21. Optionally, enter the name of the building as Place Name
22. Enter the Address in the Address Line 1 field
23. Optionally, add an Address Line 2
24. Optionally, add the Unit/Apartment Number
25. Select the Country. If the Country selected is Canada, additional fields for Province/Territory, City, and Postal Code will appear
26. Optionally, select the Geographic Region for this Unit
27. Click **SAVE** when done




Now you're on the **Housing Unit List** Screen

How To: Edit a Housing Unit

Go to the Housing Unit List

1. Click on the **FRONT DESK MENU**
2. Click on **HOUSING PLACEMENT**
3. Click on **HOUSING UNIT**

A screenshot of the 'Housing Unit List' interface. At the top, there is a notification banner with a green icon and the text 'Now you're on the Housing Unit List'. Below this, the title 'Housing Unit List' is displayed with a help icon. The interface includes filter tabs for 'Active' and 'All', a 'Filter Options' dropdown, and a status indicator 'Showing 1 to 2 of 2 entries | Show 10 entries'. A table with columns 'Service Providers', 'Address', 'Housing Type', 'Unit Status', 'Properties', and 'Action' contains two rows of data. The first row shows '1010 Centre St SE, Calgary' with 'Subsidized / Social Housing' and 'Good 01/04/2017'. The second row shows 'Demo Organization' at '99 Brock St.' with 'Rental at Market Price' and 'Fair 26/05/2017'. Each row has an 'Action' column with edit and delete icons. At the bottom left is an 'Add Housing Unit' button, and at the bottom right is a blue box with the number '1'.





Now you're on the **Housing Unit List**

Housing Unit List

Active All

Filter Options

Showing 1 to 2 of 2 entries | Show 10 entries

Service Providers	Address	Housing Type	Unit Status	Properties	Action
	1010 Centre St SE, Calgary	Subsidized / Social Housing	Good 01/04/2017		 
Demo Organization	99 Brock St.	Rental at Market Price	Fair 26/05/2017	7 - Other Service Details	 

+ Add Housing Unit

1

Edit a Record

1. Click on  or  for the record you would like to edit

A notification banner with a green icon and the text 'Now you're on the Edit Screen'.

Now you're on the **Edit** Screen

How To: Add a Maintenance Record to a Housing Unit

Edit a Housing Unit

See [Edit a Housing Unit \(on the previous page\)](#).

Go to Maintenance Tab

1. Click on the **MAINTENANCE** tab

Now you're on the **Maintenance** tab

Edit Housing Unit

Details ★ Address ★ Photos Maintenance

Maintenance Work	Description	Scheduled Date	Contractor	Actual Cost	Action
Plumbing	Leak in bathroom sink	2017-04-01	Ryder, Ali	\$100.00	
Windows	Replace side window after fight	2017-01-02		\$400.00	

Total: \$500.00

[+ Add Maintenance Work](#)

Add a Maintenance Record

1. Click on the **ADD MAINTENANCE WORK** button

Now you're on the **Add Maintenance Work** Screen

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The screenshot shows a web-based form titled "Add Maintenance Work". The form contains the following fields and controls:

- Maintenance Work:** A dropdown menu with the text "Select an option" and a red star icon.
- Description:** A text area for entering details.
- Contractor:** A dropdown menu with the text "Select an option".
- Work Completed:** A checkbox currently set to "No".
- Company:** A text field for the contractor's name.
- Comments:** A text area for additional notes.
- Scheduled Start Date:** A date picker with a calendar icon and a red star icon.
- Scheduled End Date:** A date picker with a calendar icon.
- Estimated Cost:** A text field with a dollar sign prefix.
- Actual From Date:** A date picker with a calendar icon and a red star icon.
- Actual To Date:** A date picker with a calendar icon.
- Actual Cost:** A text field with a dollar sign prefix.

At the bottom of the form are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with an 'X' icon).

2. Select the type of Maintenance Work completed
3. Add a description about this Maintenance Work
4. Optionally, select the Contractor from the drop-down list
5. Indicate whether the Maintenance Work was completed
6. Optionally, enter the Company that performed this work
7. Optionally, record some notes about this Maintenance Work
8. Select the Scheduled Start Date of this Maintenance Work
9. Optionally, select the Scheduled End Date of this Maintenance Work
10. Optionally, enter the Estimated Cost of this Maintenance Work
11. Select the date the Maintenance Work actually started
12. Optionally, select the date the Maintenance Work actually completed

13. Optionally, enter the Actual Cost of this Maintenance Work
14. Click **SAVE** when done



Now you're on the **Edit Housing Unit** Screen

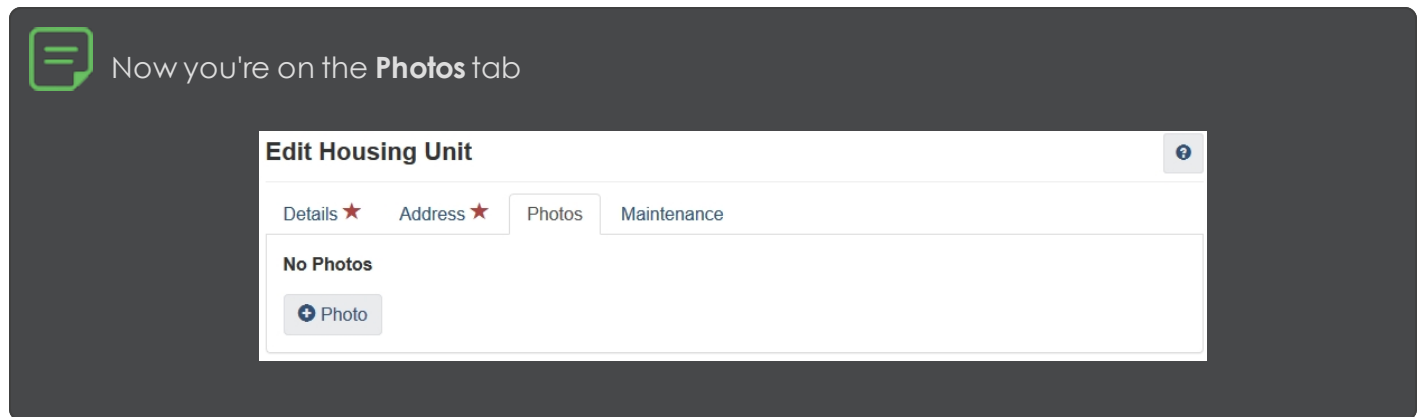
How To: Add Photos of a Housing Unit

Edit a Housing Unit

See [Edit a Housing Unit \(on page 79\)](#).

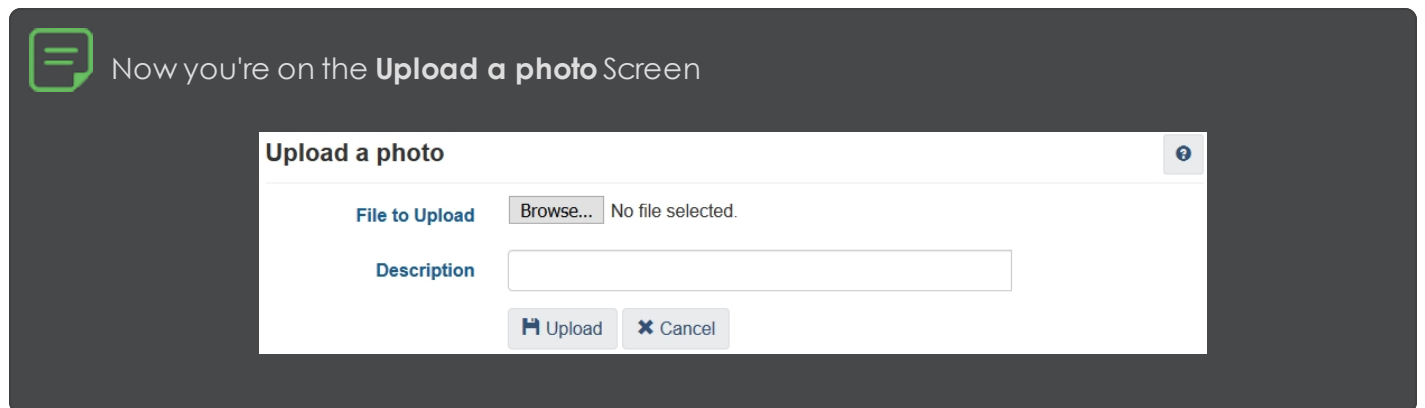
Go to Photos Tab

1. Click on the **PHOTOS** tab



Add a Photo

1. Click on the + **PHOTO** button



2. Click **BROWSE...**
 - a. In the File Upload window, navigate to and select the file you wish to upload from your computer
 - b. Click **OPEN**
 - c. The File Upload window will close and your file name will be listed in the Attachments field
3. Optionally, record a description about this Photo
4. Click **SAVE** when done

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Now you're on the **Edit Housing Unit** Screen

How To: Delete a Housing Unit



As of Build 4.0.55, Housing Units cannot be deleted. However, they can be Deactivated (see [Deactivate a Housing Unit \(on the facing page\)](#)) or made temporarily unavailable (see [Mark a Housing Unit as Temporarily Unavailable \(on page 87\)](#)).

How To: Deactivate a Housing Unit

Edit a Housing Unit

See [Edit a Housing Unit](#) (on page 79).

Deactivate the Record

1. Toggle the Active field to "No"
2. Click on the **SAVE** button

How To: Mark a Housing Unit as Temporarily Unavailable

Edit a Housing Unit

See [Edit a Housing Unit \(on page 79\)](#).

Change the Occupancy Status

1. Change the Occupancy Status field from "Available" to another option corresponding with its reason for unavailability
2. Change the Occupancy Status Date field to the date corresponding with the new status
3. Optionally, add a note in the Occupancy Comment field
4. Click on the **SAVE** button

CHAPTER 6: Assessments

Chapter Contents

How To: Add a VI-SPDAT	89
How To: Add a SPDAT	92
How To: Complete New Survey	95

How To: Add a VI-SPDAT

Go to the SPDAT List

1. Click on the **FRONT DESK MENU**
2. Click on **ASSESSMENTS**
3. Click on **SPDAT**



Now you're on the **SPDAT Intake List**

Go to the VI-SPDAT Tab

1. Click on the **VI-SPDAT** tab



Now you're on the **VI-SPDAT Tab**

SPDAT Intake List

Filter: All **Filter by date**

VI-SPDAT **SPDAT** **Filter by text**

Showing 1 to 5 of 5 entries | Show 10 entries

Client Name	Start Date and Time	Caseworker	Type	Version	Score	Action
Allen, Barry	2016-11-15 08:16 AM	Bigalow, Sam	Adult	1	9	
Allen, Barry	2017-01-05 07:55 AM	LeBlanc, Miguel	Adult	1		
Doe, Johnny	2017-03-03 12:58 PM	Abbott, Jason	Adult	1	11	
Kent, Darren	2016-10-20 10:33 AM	Abouanni, Charbel	Adult	2	13	
Kent, Darren	2017-02-15 05:00 PM	Fulford, Darren	Adult	1	9	

Add a new VI-SPDAT
(select the button for the version you would like to complete)

Start a new VI-SPDAT assessment by selecting one of the following.


+ Adult v1 + Adult v2 + Family v1 + Family v2 + Youth v1

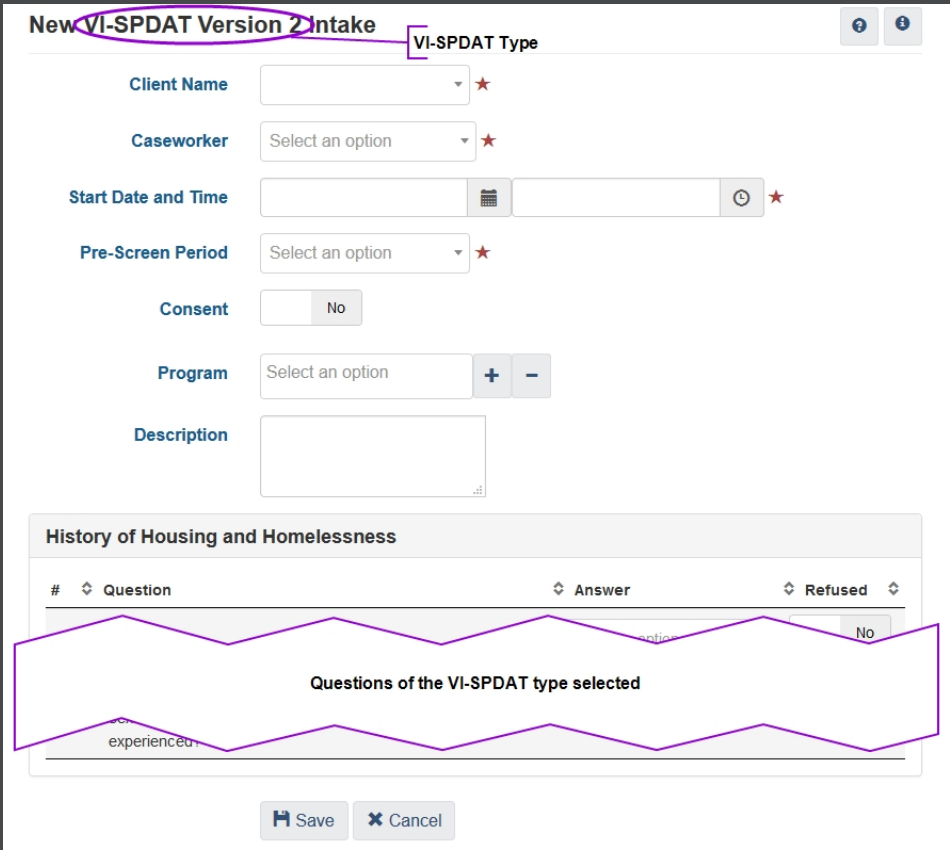
Display this VI-SPDAT
Edit this VI-SPDAT
Delete this VI-SPDAT

1

Add a VI-SPDAT

1. Choose which version of VI-SPDAT you would like to do (i.e. VI-SPDAT v2, F-VI-SPDAT v2, TAY-VI-SPDAT v1)
2. Click on the button corresponding to the type of VI-SPDAT you would like to do (for example, if you wanted to do a TAY-VI-SPDAT v1, click on the **+YOUTH V1** button)

 Now you're on **Add VI-SPDAT** Screen for the type of VI-SPDAT you selected



New VI-SPDAT Version 2 Intake VI-SPDAT Type

Client Name *

Caseworker *

Start Date and Time *

Pre-Screen Period *

Consent No

Program + -

Description

History of Housing and Homelessness

#	Question	Answer	Refused
			No

Questions of the VI-SPDAT type selected

Save Cancel

3. Select the Client Name. If you arrived here from the **Client - SPDAT List** screen, this field is already filled out.
4. Select the caseworker who completed the assessment
5. Confirm the start date and time. If needed, you can change this date and time manually.
6. Select the Pre-Screen Period for this VI-SPDAT assessment. What this means is how many times has this client completed a VI-SPDAT? Is this the first, second, etc. time?

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7. If applicable, indicate whether the client was pregnant at the time of the VI-SPDAT assessment (only asked for some VI-SPDAT versions)
8. Indicate whether the client provided consent to complete this assessment
9. Select the program this assessment was completed in
10. Add a description about this assessment
11. For each question on the VI-SPDAT, select the Client's answer. If the Client did not answer, toggle Refused to "Yes"
12. Click the **SAVE** button.



Now you're on **Display VI-SPDAT** Screen

How To: Add a SPDAT

Go to the SPDAT List

1. Click on the **FRONT DESK MENU**
2. Click on **ASSESSMENTS**
3. Click on **SPDAT**



Now you're on the **SPDAT Intake List**

Go to the SPDAT Tab

1. Click on the **SPDAT** tab



Now you're on the **SPDAT** tab

SPDAT Intake List

Filter: 1 Year(s) Filter by date

VI-SPDAT **SPDAT** Filter by text

Showing 1 to 2 of 2 entries | Show 10 entries

Client Name	Start Date and Time	Caseworker	Type	Version	Score	Action
Granger, Hermione	23/07/2017 6:54:00 AM	Test, Adil	Youth	1	38	[Edit] [View] [Delete]
Granger, Hermione	17/05/2017 10:21:00 AM	LeBlanc, Miguel	Adult	4	32	[Edit] [View] [Delete]

Add a new SPDAT
(select the button for the version you would like to complete)

Start a new SPDAT assessment by selecting one of the following:

+ Adult v3 + Adult v4 + Family v1 + Family v2 + Youth v1

Display this SPDAT Edit this SPDAT Delete this SPDAT

Add a SPDAT

1. Choose which version of SPDAT you would like to do (i.e. SPDAT v4, F-SPDAT v2, Y-SPDAT v1)
2. Click on the button corresponding to the type of SPDAT you would like to do (for example, if you wanted to do an F-SPDAT v2, click on the **+FAMILY V2** button)

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Now you're on the **Add SPDAT** screen for the type of SPDAT you selected

New SPDAT Version 1 Intake SPDAT Type

Client Name ★

Caseworker ★

Start Date and Time ★

Assessment Period ★

Consent

Program + -

Description

Wellness

#	Question	Answer

Questions of the SPDAT type selected

2
 3
 4

3. Select the Client Name. If you arrived here from the **Client - SPDAT List** screen, this field is already filled out.
4. Select the caseworker who completed the assessment
5. Confirm the start date and time. If needed, you can change this date and time manually.
6. Select the Assessment Period for this SPDAT assessment
7. Indicate whether the client provided consent to complete this assessment
8. Select the program this assessment was completed in
9. Add a description about this assessment

10. For each component on the SPDAT, fill in, at a minimum, the numerical value in the Answer column. Optionally, you can also provide some comments for each component.
11. Click the **SAVE** button.



Now you're on the **Display SPDAT** screen


How To: Complete New Survey

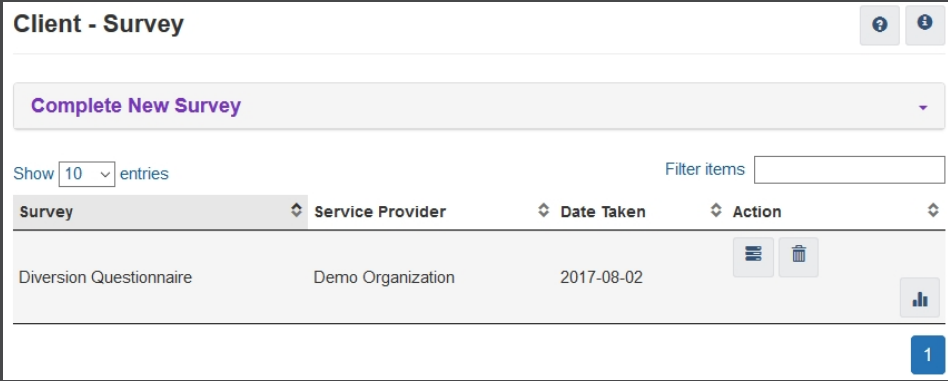
Open a Client File

If you don't already have a Client File open, open one. See [Open a Client File \(on page 1\)](#)

Go to the Client Surveys List

1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **SURVEYS**


 Now you're on the **Client - Survey** screen

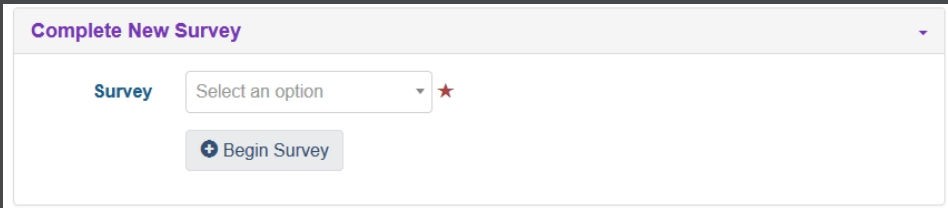


The screenshot shows the 'Client - Survey' interface. At the top, there is a 'Complete New Survey' button. Below it, there is a 'Show 10 entries' dropdown and a 'Filter items' search box. A table lists survey entries with columns for 'Survey', 'Service Provider', 'Date Taken', and 'Action'. The first entry is 'Diversion Questionnaire' by 'Demo Organization' on '2017-08-02'. There are icons for menu and delete in the 'Action' column. A blue box with the number '1' is in the bottom right corner.

Add a Survey

1. Click on **COMPLETE NEW SURVEY**

 A new field will reveal, prompting you to select a Survey



The screenshot shows the 'Complete New Survey' dialog box. It features a 'Survey' label next to a dropdown menu that currently displays 'Select an option' with a red star icon to its right. Below the dropdown is a button labeled '+ Begin Survey'.

2. Select the Survey you would like to complete
3. Click on **+BEGIN SURVEY**

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Now you're on the **Take Survey** screen for the Survey you selected

#	Question	Response
1	What's the client's favourite colour?	Select an option
2	How many pets does the client have?	

4. Confirm the date the Survey was taken
5. For each question on the Survey, answer the question
6. Click the **SAVE** button



Now you're on the **Client - Survey** screen

CHAPTER 7:

Waiting Lists

Although the Waiting Lists module was designed for the purpose of tracking who is waiting for what and for how long, other creative uses of the Waiting Lists module are possible. Some examples:

- » The Waiting List module could be easily used for Prioritization or a By-Name List. Although the Waiting List does automatically calculate how long a person has been waiting, that field could be ignored in your community.
- » The Waiting List could also be used as a referrals section, by creating a Waiting List that is shared between two Service Providers. One Service Provider could add people to the Waiting List and the other Service Provider could take them off when they have been received.
- » The Waiting List could be used as a "to do list" by a team of assessment workers who want a central repository where they can see a list of who has been assessed, who has been contacted by a colleague, who has an appointment booked, and who needs to be assessed.


Chapter Contents

How To: See who is on a Waiting List	98
How To: See what Waiting List(s) a Client is on	100
How To: Add a Client to a Waiting List	101
How To: Change a Client's Status on a Waiting List	103
How To: Remove a Client from a Waiting List	105

How To: See who is on a Waiting List

Go to the Waiting Lists

1. Click on the **FRONT DESK MENU**
2. Click on **WAITING LISTS**










 Now you're on the **Waiting Lists** Screen

Waiting Lists

Filter: All **Filter by date range**

Show 10 entries

Filter by text
Filter items

Waiting List Name	Waiting List Type	Start Date and Time	Action
Housing First	Housing	2016-11-24	  
Prioritization List	Service	2016-12-21	  
Supportive Housing	Housing	2016-12-21	  

Add a new Waiting List

Add Waiting List

Display this Waiting List

Edit this Waiting List

Manage the Clients on this Waiting List

1

Manage Clients

1. Click on the  button

 Now you're on **Manage Clients** Screen

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Prioritization List Manage Clients

Active Closed

Name of Waiting List

Filter by active status

Filter by text

Show 10 entries

Client Name	Start Date and Time	End Date and Time	Days	Priority	Status	Status Date	Action
Rogers, Steve	2016-12-21	- -	0	High	Waiting - No Offers	2016-12-21	
Wayne, Bruce	2016-11-02	- -	49	Normal	Waiting - Declined 1	2016-12-21	

Add a Client to this Waiting List

Display this Client's Waiting List history

Edit this Client's status on this Waiting List

Delete the record of this Client on this Waiting List

+ Add Client to Waiting List ✕ Cancel Return to Waiting Lists

1


How To: See what Waiting List(s) a Client is on

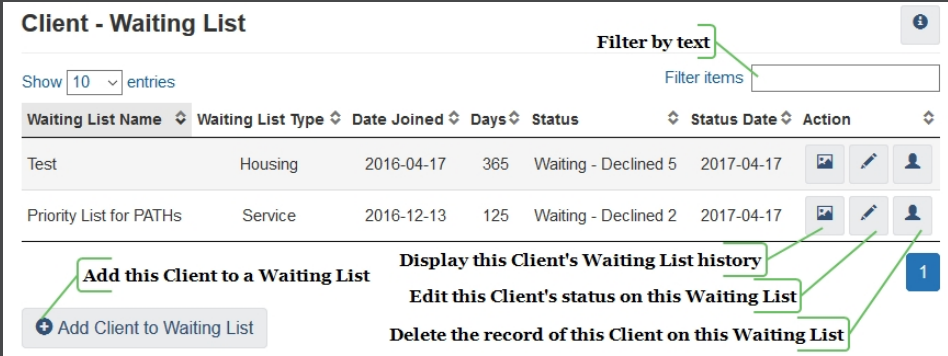
Open a Client File

If you don't already have a Client File open, open one. See [Open a Client File \(on page 1\)](#)







Go to the Client Waiting List Screen

1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **WAITING LISTS**

 Now you're on the **Client - Waiting List** Screen



The screenshot shows the 'Client - Waiting List' interface. At the top right, there is a 'Filter by text' field. Below it, a 'Show 10 entries' dropdown and a 'Filter items' search box are visible. A table lists waiting lists with columns for 'Waiting List Name', 'Waiting List Type', 'Date Joined', 'Days', 'Status', and 'Status Date'. Two rows are shown: 'Test' (Housing, 2016-04-17, 365 days, Waiting - Declined 5, 2017-04-17) and 'Priority List for PATHs' (Service, 2016-12-13, 125 days, Waiting - Declined 2, 2017-04-17). Below the table, there is an 'Add Client to Waiting List' button. To the right, three callouts point to icons: 'Display this Client's Waiting List history' (eye icon), 'Edit this Client's status on this Waiting List' (pencil icon), and 'Delete the record of this Client on this Waiting List' (trash icon). A blue notification badge with the number '1' is also present.

Waiting List Name	Waiting List Type	Date Joined	Days	Status	Status Date	Action
Test	Housing	2016-04-17	365	Waiting - Declined 5	2017-04-17	  
Priority List for PATHs	Service	2016-12-13	125	Waiting - Declined 2	2017-04-17	  

Add this Client to a Waiting List
Add Client to Waiting List

Display this Client's Waiting List history

Edit this Client's status on this Waiting List

Delete the record of this Client on this Waiting List


How To: Add a Client to a Waiting List

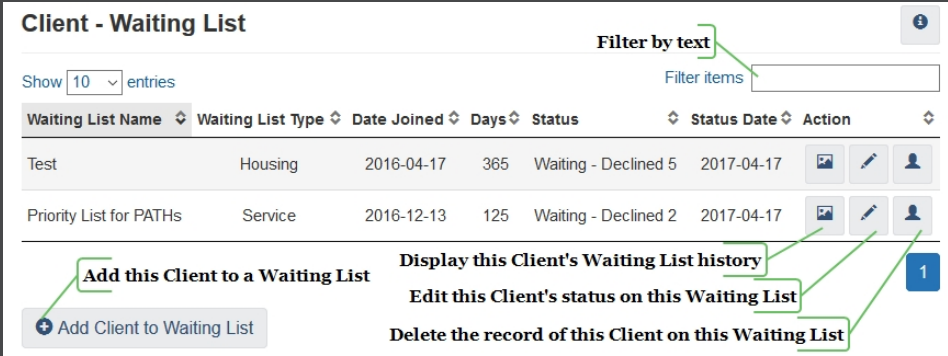
Open a Client File

If you don't already have a Client File open, open one. See [Open a Client File \(on page 1\)](#)

Go to the Client Waiting List Screen

1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **WAITING LISTS**

 Now you're on the **Client - Waiting List** Screen



The screenshot shows the 'Client - Waiting List' interface. At the top right, there is a 'Filter by text' field. Below it, a 'Show 10 entries' dropdown and a 'Filter items' search box are visible. A table lists waiting lists with columns for 'Waiting List Name', 'Waiting List Type', 'Date Joined', 'Days', 'Status', and 'Status Date'. Two rows are shown: 'Test' (Housing, 2016-04-17, 365 days, Waiting - Declined 5, 2017-04-17) and 'Priority List for PATHs' (Service, 2016-12-13, 125 days, Waiting - Declined 2, 2017-04-17). Below the table, there is an 'Add Client to Waiting List' button. To the right of the table, there are three callout boxes with arrows pointing to the 'Action' column icons: 'Add this Client to a Waiting List' (pointing to the plus icon), 'Display this Client's Waiting List history' (pointing to the camera icon), and 'Delete the record of this Client on this Waiting List' (pointing to the trash icon). A blue notification bubble with the number '1' is also present.

Add Client to a Waiting List

1. Click on the **ADD CLIENT TO WAITING LIST** button.

Client - Add Client to Waiting List



Waiting List Name Sample Waiting List ★

Client Name ★

Start Date ★

End Date

Priority Select an option ★

Reason for Being on List Select an option ★

Status on Waiting List Select an option ★

Status Date ★

Comments

Edit ▾ Insert ▾ Format ▾ View ▾ Table ▾

Font Sizes ▾ **A** ▾ **A** ▾ **B** *I* U

p Words: 0

Save Cancel

2. Select the Waiting List you would like to add the Client to. If you arrived here from **Manage Clients Screen**, this is pre-filled.
3. Select the name of the Client you would like to add. If you arrived here from **Client Waiting List Screen**, this is pre-filled.
4. Verify the Start Date. This is the date on which the Client is added to the Waiting List.
5. Leave the End Date blank. You will add a value here when the Client is removed from the Waiting List.
6. Complete all the remaining mandatory and optional fields, as instructed by your supervisor.
7. Click **SAVE** when done




Now you're on the **Manage Clients Screen**

How To: Change a Client's Status on a Waiting List

Go to the Waiting Lists

1. Click on the **FRONT DESK MENU**
2. Click on **WAITING LISTS**










 Now you're on the **Waiting Lists** Screen

Waiting Lists

Filter: All **Filter by date range**

Show 10 entries

Filter by text
Filter items

Waiting List Name	Waiting List Type	Start Date and Time	Action
Housing First	Housing	2016-11-24	  
Prioritization List	Service	2016-12-21	  
Supportive Housing	Housing	2016-12-21	  

Add a new Waiting List

Add Waiting List

Display this Waiting List

Edit this Waiting List

Manage the Clients on this Waiting List

1

Manage Clients

1. Click on the  button

 Now you're on **Manage Clients** Screen

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Prioritization List Manage Clients

Active Closed

Name of Waiting List

Filter by active status

Show 10 entries

Filter by text

Filter items

Client Name	Start Date and Time	End Date and Time	Days	Priority	Status	Status Date	Action
Rogers, Steve	2016-12-21	--	0	High	Waiting - No Offers	2016-12-21	
Wayne, Bruce	2016-11-02	--	49	Normal	Waiting - Declined 1	2016-12-21	

Add a Client to this Waiting List

Display this Client's Waiting List history

Edit this Client's status on this Waiting List

Delete the record of this Client on this Waiting List

+ Add Client to Waiting List X Cancel Return to Waiting Lists

You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **WAITING LISTS** instead of using the Front Desk Menu.

Edit a Record

1. Click on or Edit for the record you would like to edit

Now you're on the **Edit** Screen

Change a Client's Waiting List Status


1. Select a different option in the Status on Waiting List field
2. Verify that the Status Date is accurate
3. Click **SAVE** when done, or **CANCEL** to go back

Now you're on the **Manage Clients** Screen

How To: Remove a Client from a Waiting List

Go to the Waiting Lists

1. Click on the **FRONT DESK MENU**
2. Click on **WAITING LISTS**










 Now you're on the **Waiting Lists** Screen

Waiting Lists

Filter: All **Filter by date range**

Show 10 entries

Filter by text
Filter items

Waiting List Name	Waiting List Type	Start Date and Time	Action
Housing First	Housing	2016-11-24	  
Prioritization List	Service	2016-12-21	  
Supportive Housing	Housing	2016-12-21	  

Add a new Waiting List

Add Waiting List

Display this Waiting List

Edit this Waiting List

Manage the Clients on this Waiting List

1

Manage Clients

1. Click on the  button

 Now you're on **Manage Clients** Screen

County of Simcoe Training Manual

Prioritization List Manage Clients

Active Closed

Name of Waiting List

Filter by active status

Filter by text

Show 10 entries

Client Name	Start Date and Time	End Date and Time	Days	Priority	Status	Status Date	Action
Rogers, Steve	2016-12-21	--	0	High	Waiting - No Offers	2016-12-21	
Wayne, Bruce	2016-11-02	--	49	Normal	Waiting - Declined 1	2016-12-21	

Add a Client to this Waiting List

Display this Client's Waiting List history

Edit this Client's status on this Waiting List

Delete the record of this Client on this Waiting List

+ Add Client to Waiting List X Cancel Return to Waiting Lists

You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **WAITING LISTS** instead of using the Front Desk Menu.

Edit a Record

1. Click on or for the record you would like to edit

Now you're on the **Edit** Screen

Remove a Client from the Waiting List

1. Add a value to the End Date field
2. Optional: also select a Status on Waiting List option to reflect the reason why they are being removed from the Waiting List. If you do so, ensure that the Status Date matches the End Date.
3. Click **SAVE** when done, or **CANCEL** to go back

Now you're on the **Manage Clients** Screen