Training Manual

Outreach / Non Housing First Case Management / Ongoing Support

County of Simcoe

Prepared by

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Chapter Contents

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.

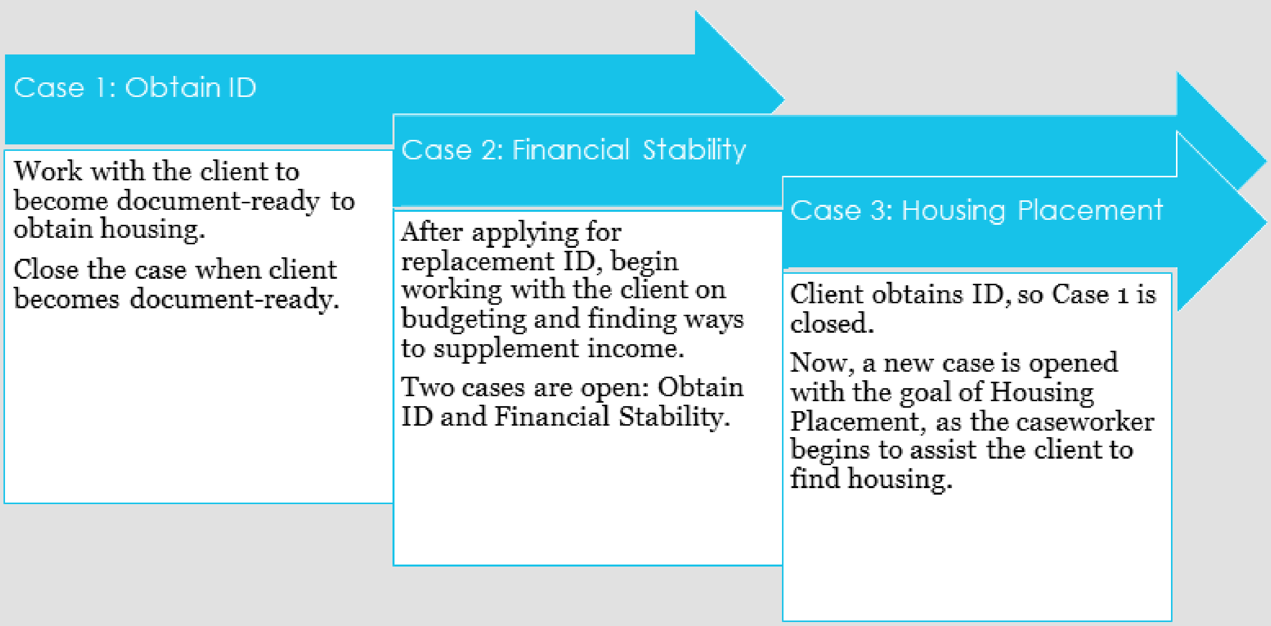
When used as intended, a Client could often have multiple cases open at a time. Each time a Caseworker meets with a client, they would first choose which goal the meeting (or Session) was related to, and record it in the appropriate Case File.

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."

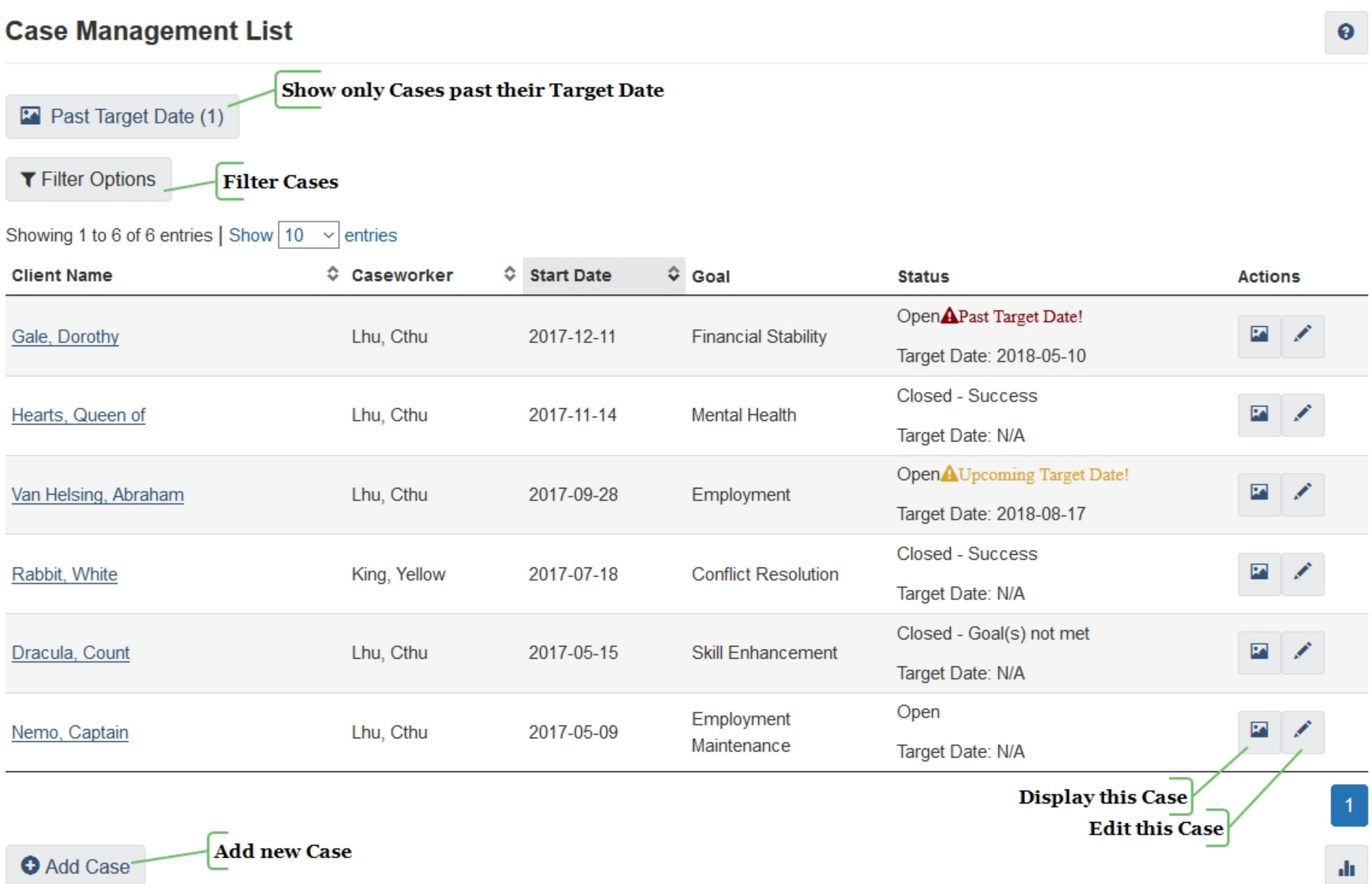
Finally, applications are in the mail, and Jasmine starts to switch gears and work with Aladdin on Financial Stability. She's noticed that he doesn't have a solid idea of what his monthly budget should be. She opens a second Case in HIFIS with the goal of "Financial Stability" even though the first Case 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

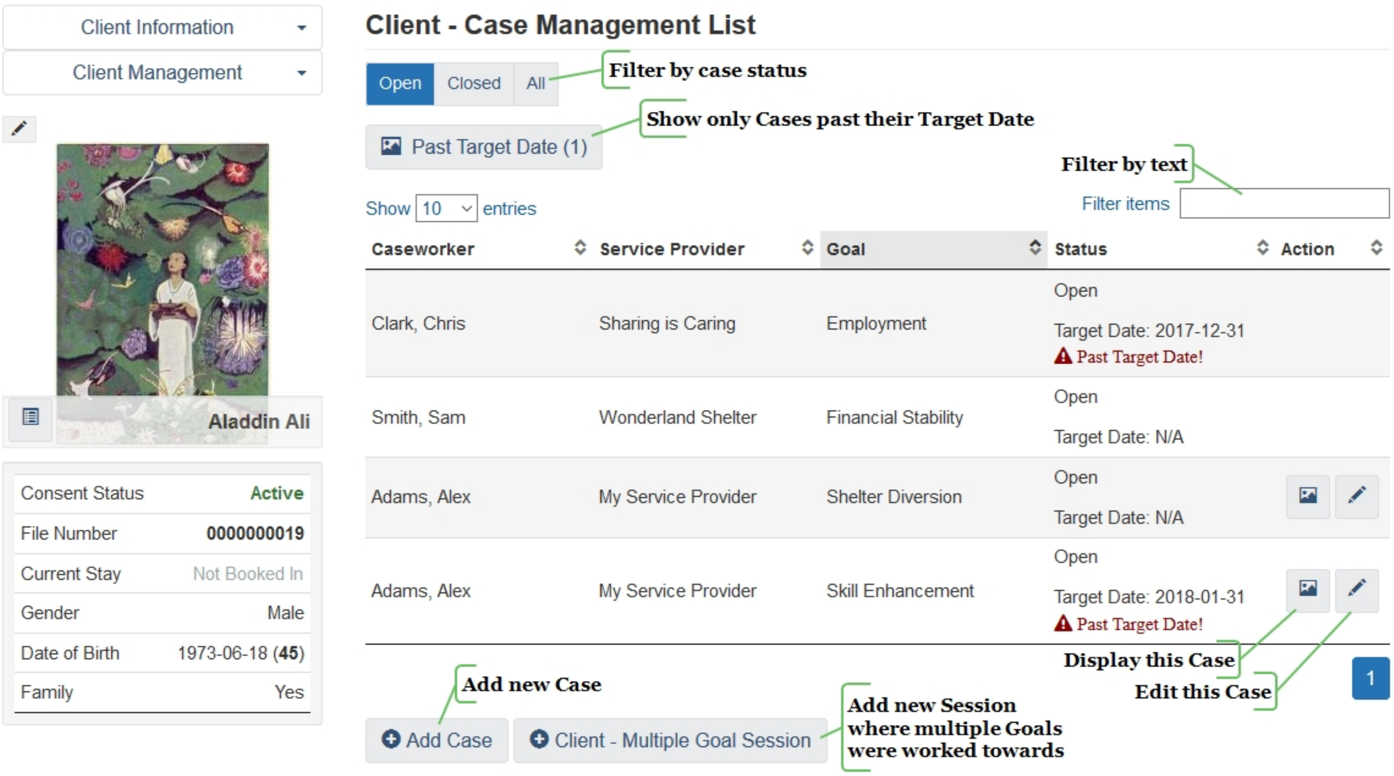
The **Case Management List** is reached via the Front Desk Menu by clicking on **CASE MANAGEMENT**. This page shows a list of all Cases opened by the active Service Provider, which can be filtered to only show a sub-section of all Cases.



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.



How To: Add a Case

Go to the Case Management List

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

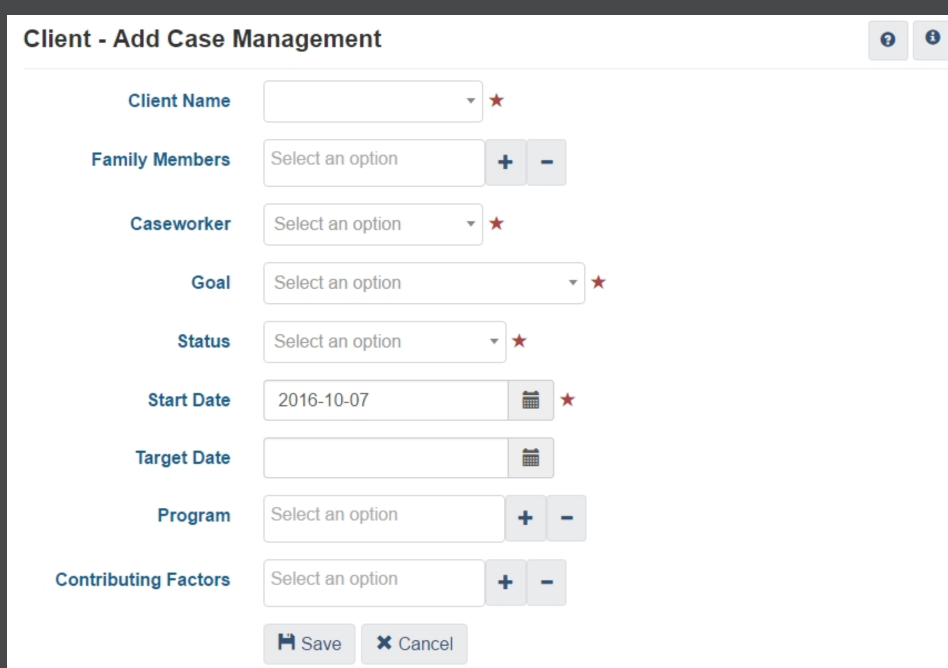
Now you're on the Case Management List (on page 7)

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



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

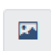
Go to the Case Management List

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

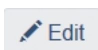
Go to the Case Management List

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 

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

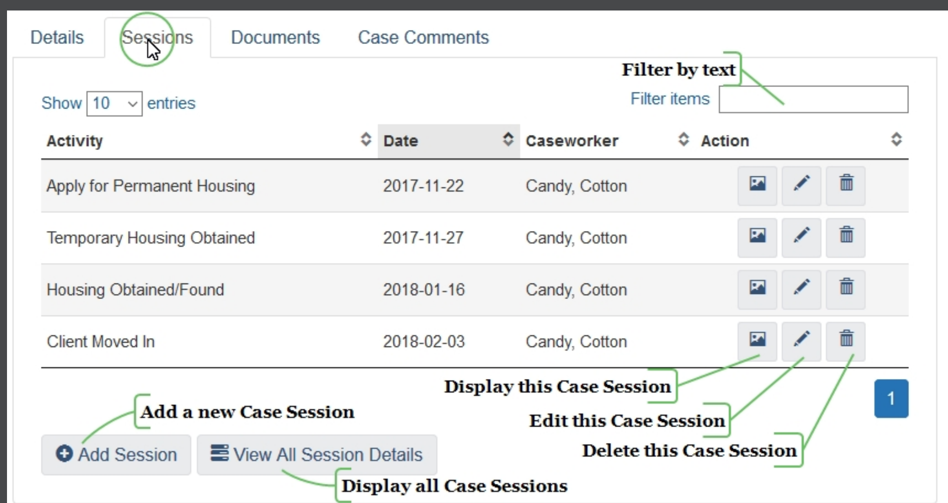
Edit a Case

See Edit a Case (on page 12)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

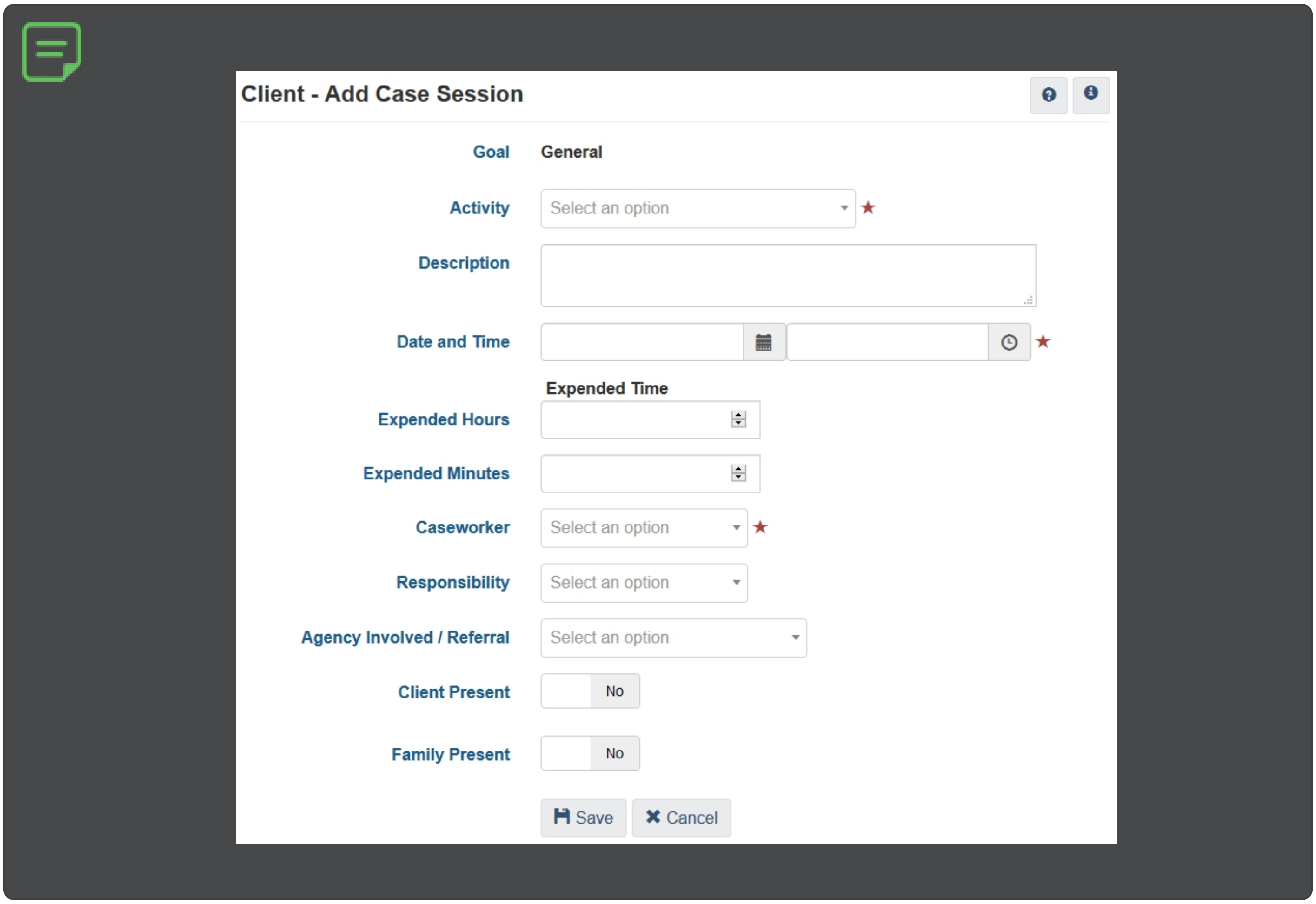
You're now on the **Sessions** tab



Add a Case Session

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

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



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.

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

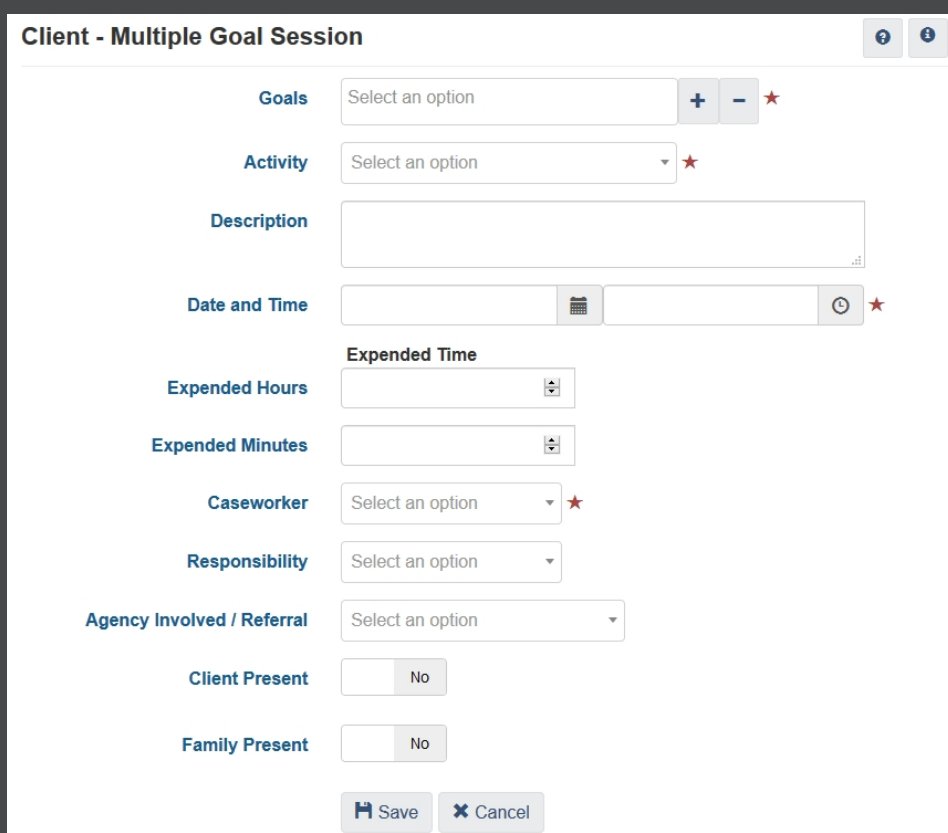
1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **CASE MANAGEMENT**

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



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

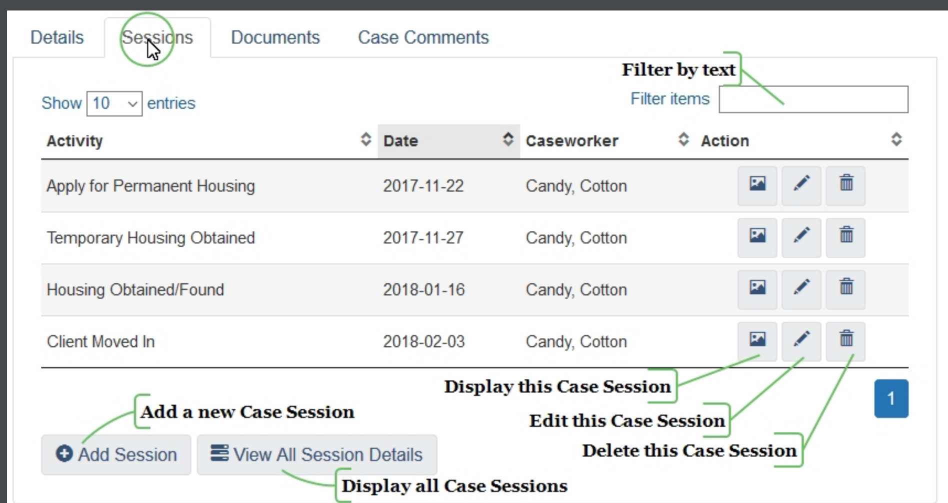
Edit a Case

See Edit a Case (on page 12)

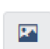
Go to the Sessions Tab

1. Click on the **SESSIONS** tab

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



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

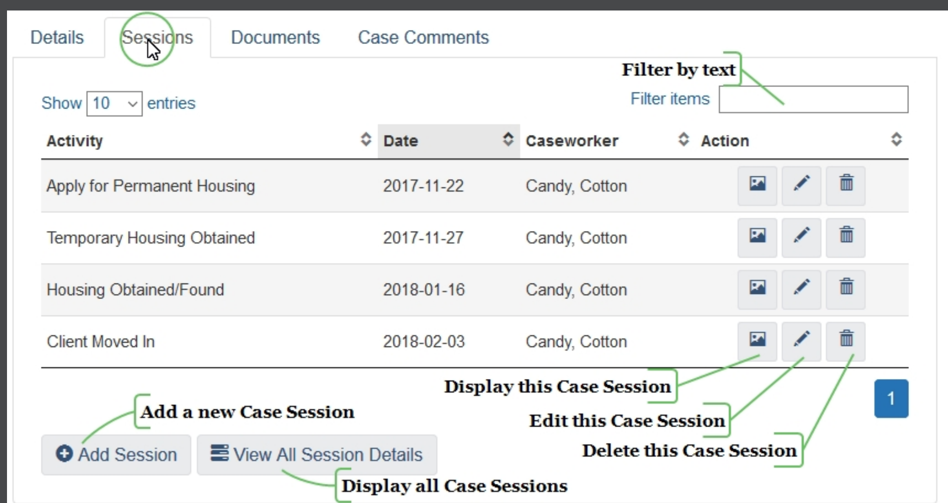
Edit a Case

See Edit a Case (on page 12)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

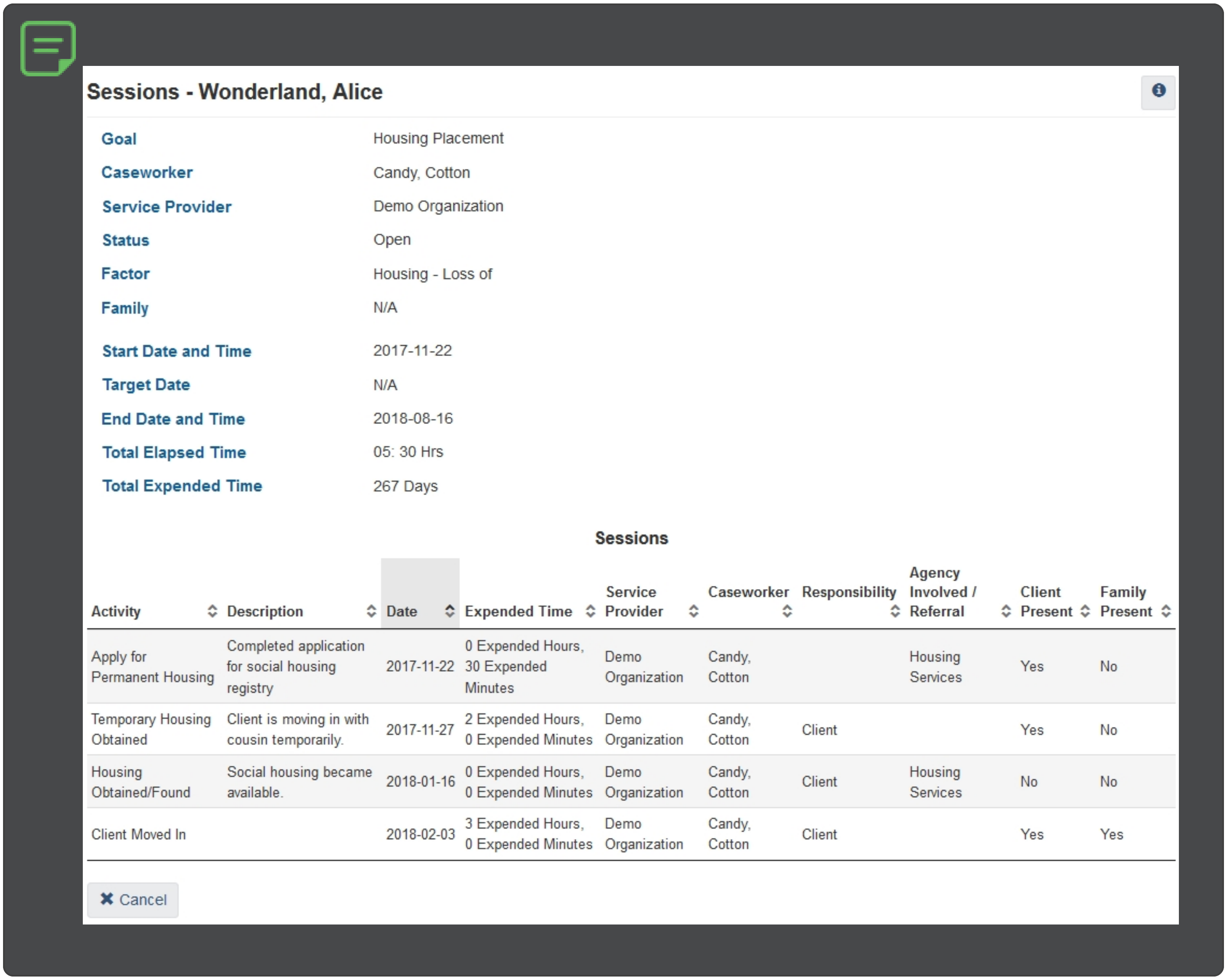
You're now on the **Sessions** tab



Display

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

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



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

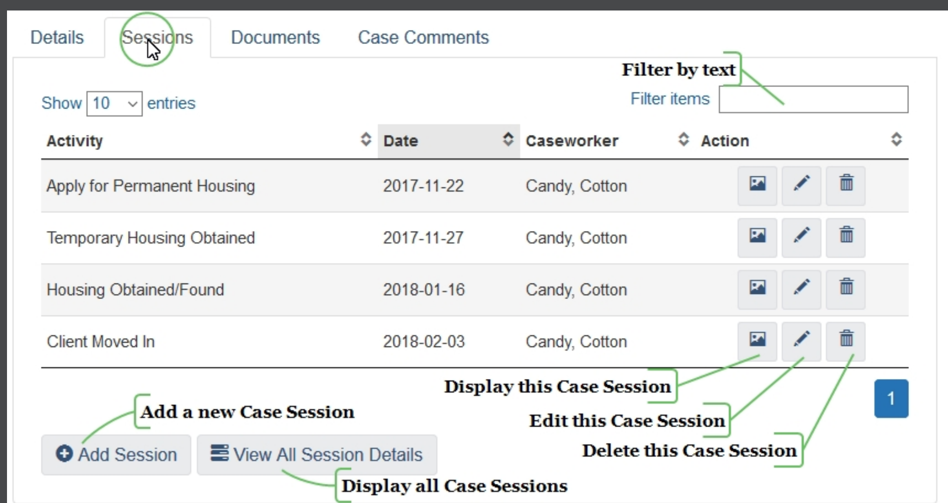
Edit a Case

See Edit a Case (on page 12)

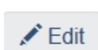
Go to the Sessions Tab

1. Click on the **SESSIONS** tab

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



Edit a Record

1. Click on  or 

for the record you would like to edit

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

How To: Add a Session Appointment

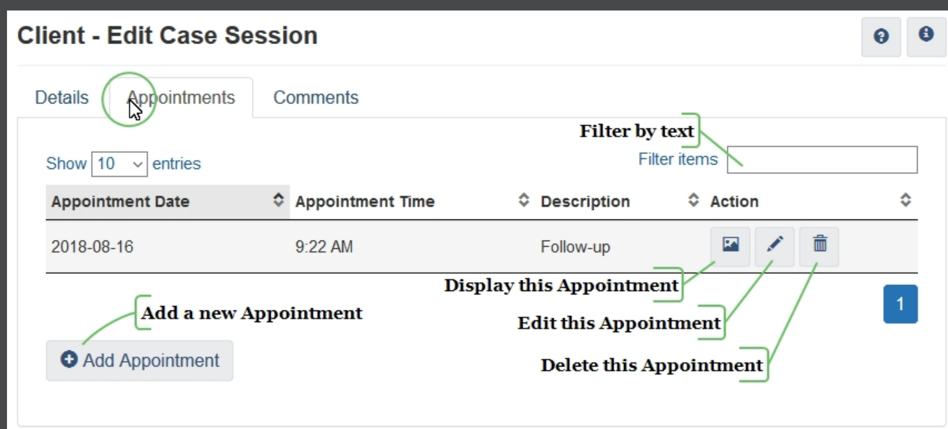
Edit a Session

See Edit a Session (on the previous page)

Go to the Session Appointments Tab

1. Click on the **APPOINTMENTS** tab

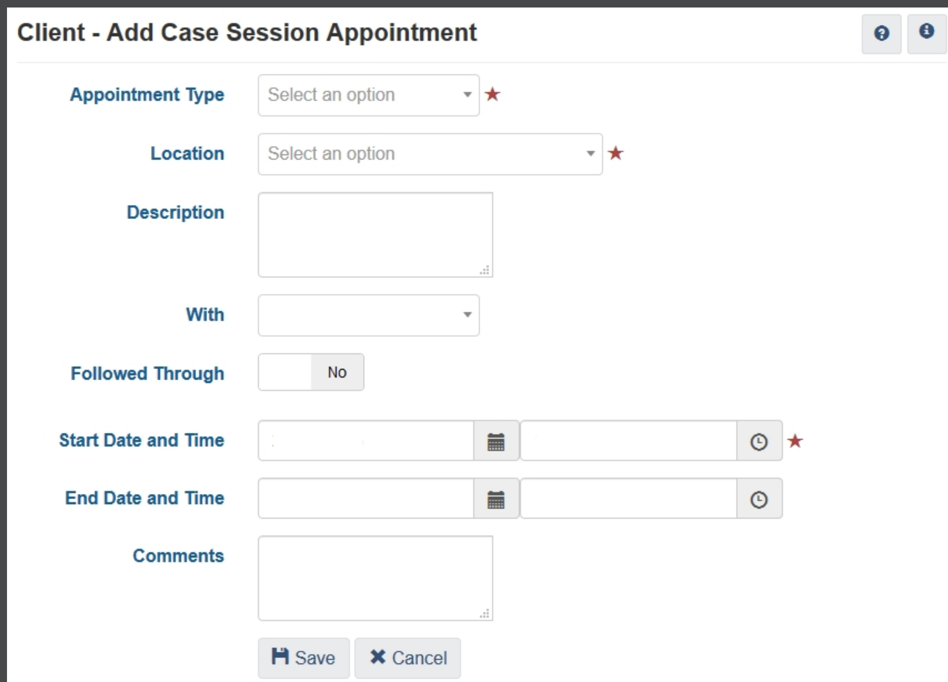
You're now on the **Appointments** tab



Add a Case Session Appointment

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

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



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

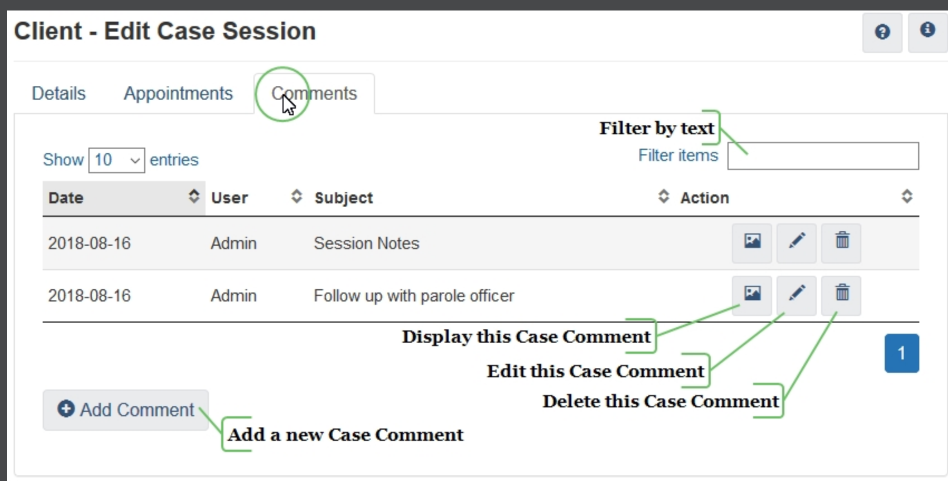
Edit a Session

See Edit a Session (on page 22)

Go to the Session Comments Tab

1. Click on the **COMMENTS** tab

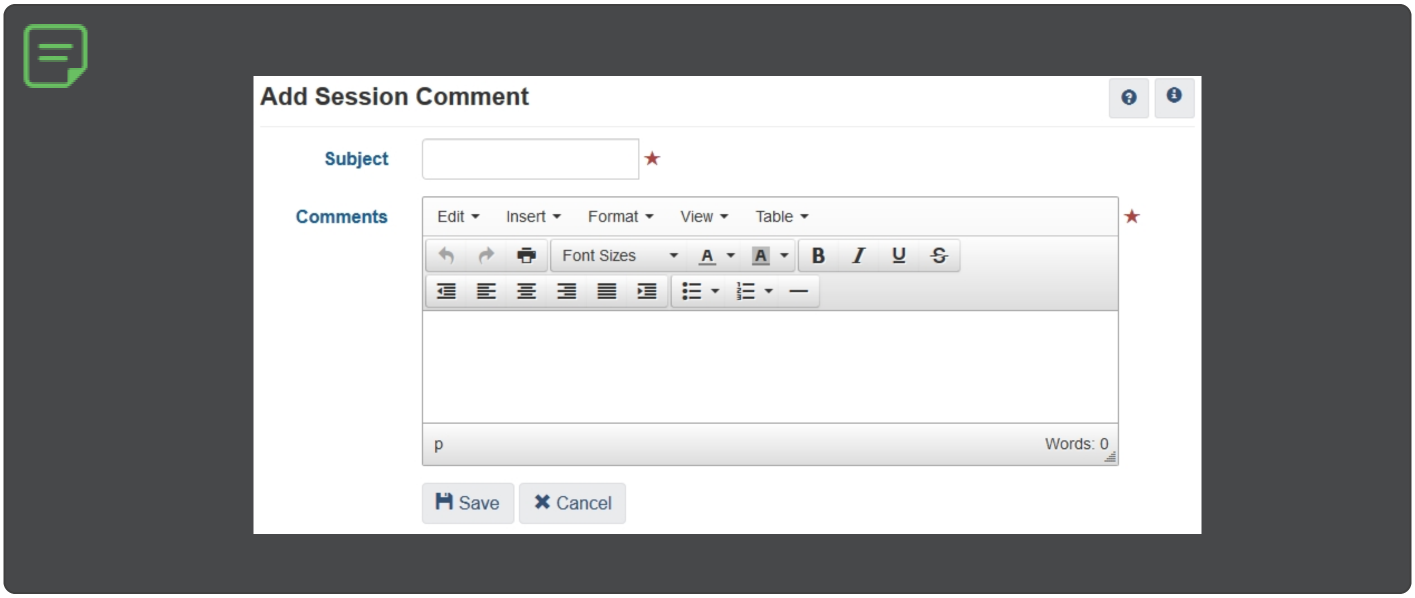
You're now on the **Comments** tab



Add a Session Comment

1. Click on **ADD COMMENT**.

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



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

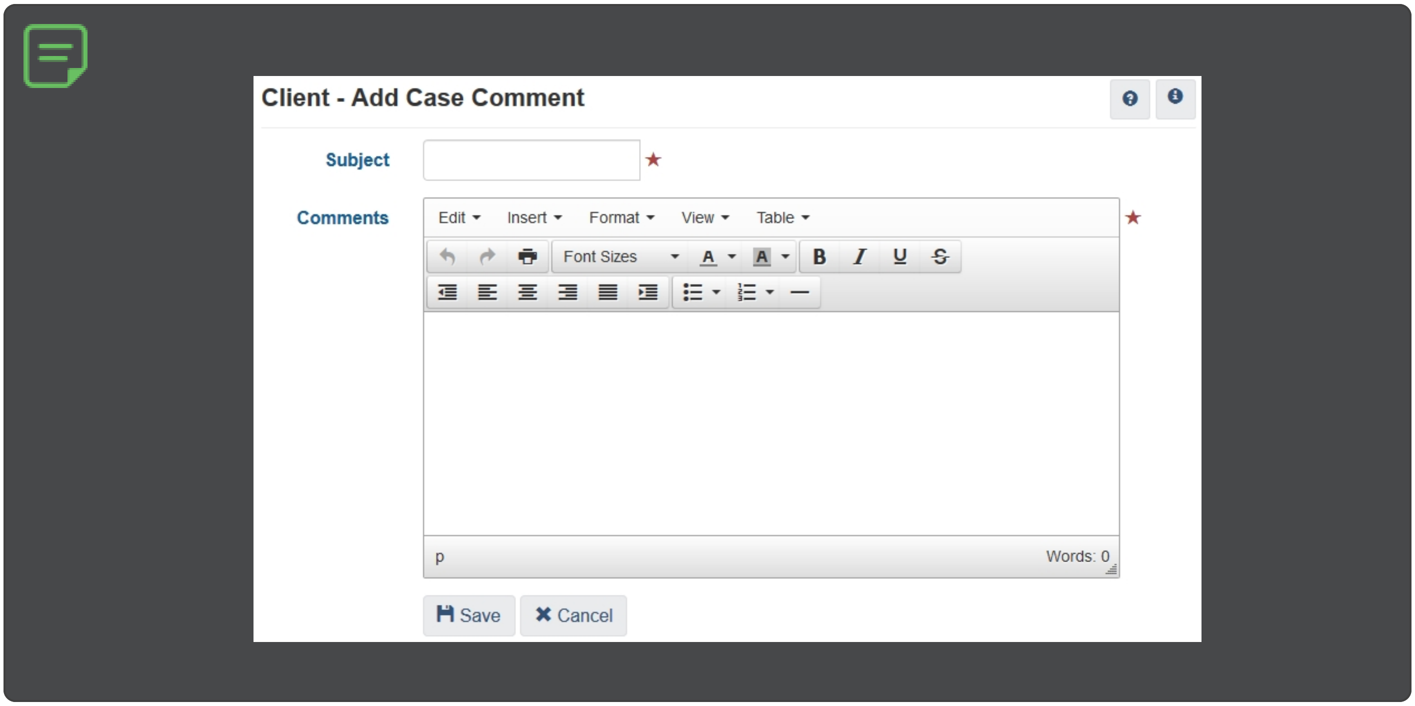
1. Click on the **CASE COMMENTS** tab

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

Add Comment

1. Click on **ADD COMMENT**.

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



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

How To: Add a Document to an Existing Case

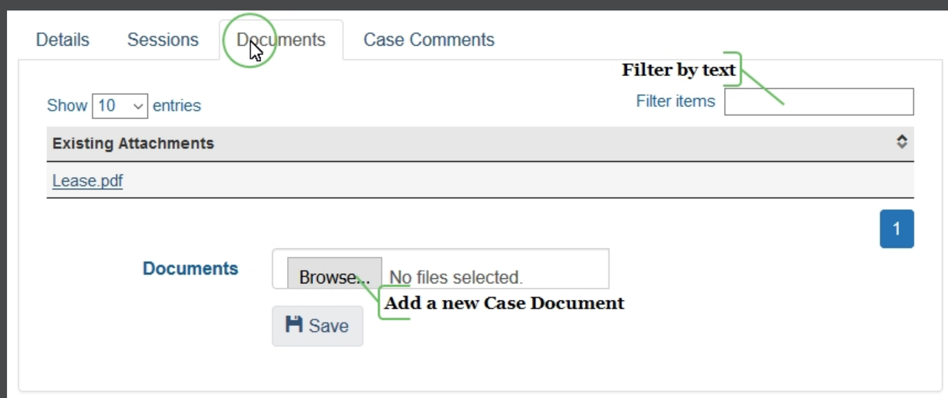
Edit a Case

See Edit a Case (on page 12)

Go to the Documents Tab

1. Click on the **DOCUMENTS** tab

You're now 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.

Now you're on the **Client - Document List** screen

CHAPTER 3: Goods and Services

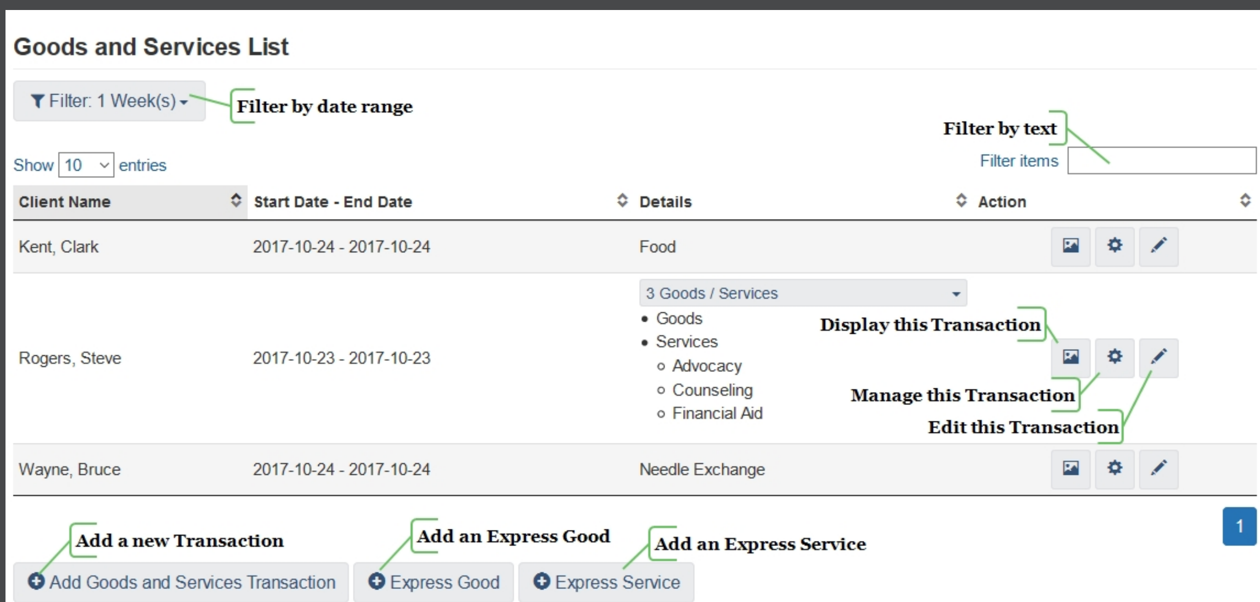
Chapter Contents

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**

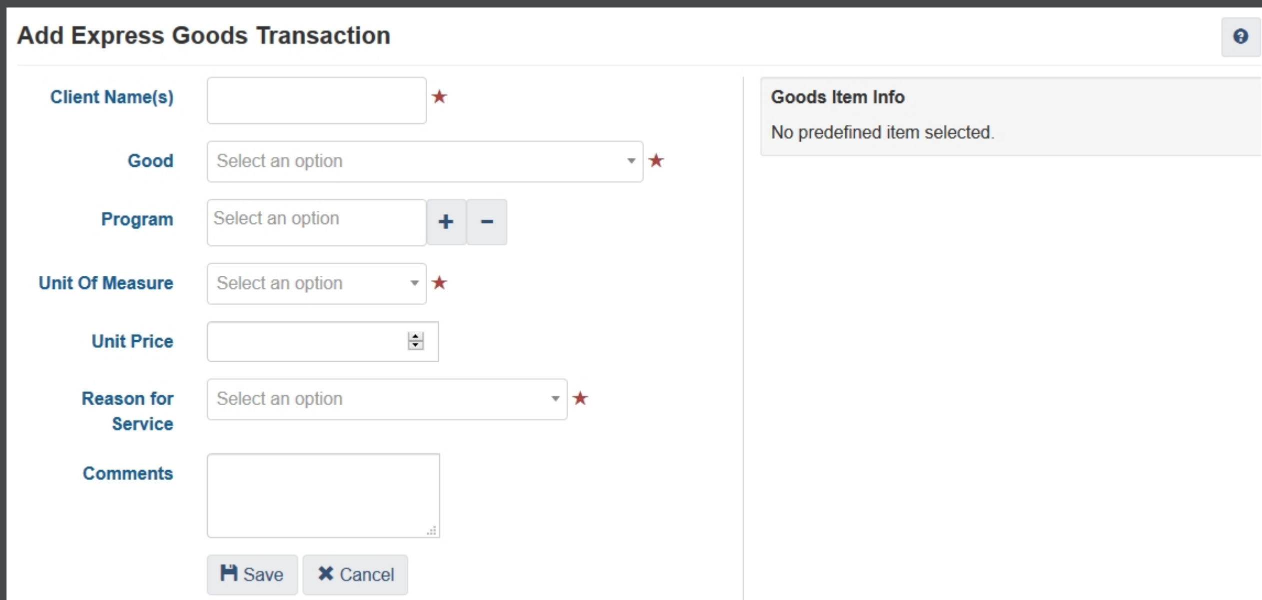


You can also Open a Client File (on page 1) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Add an Express Good

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

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



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

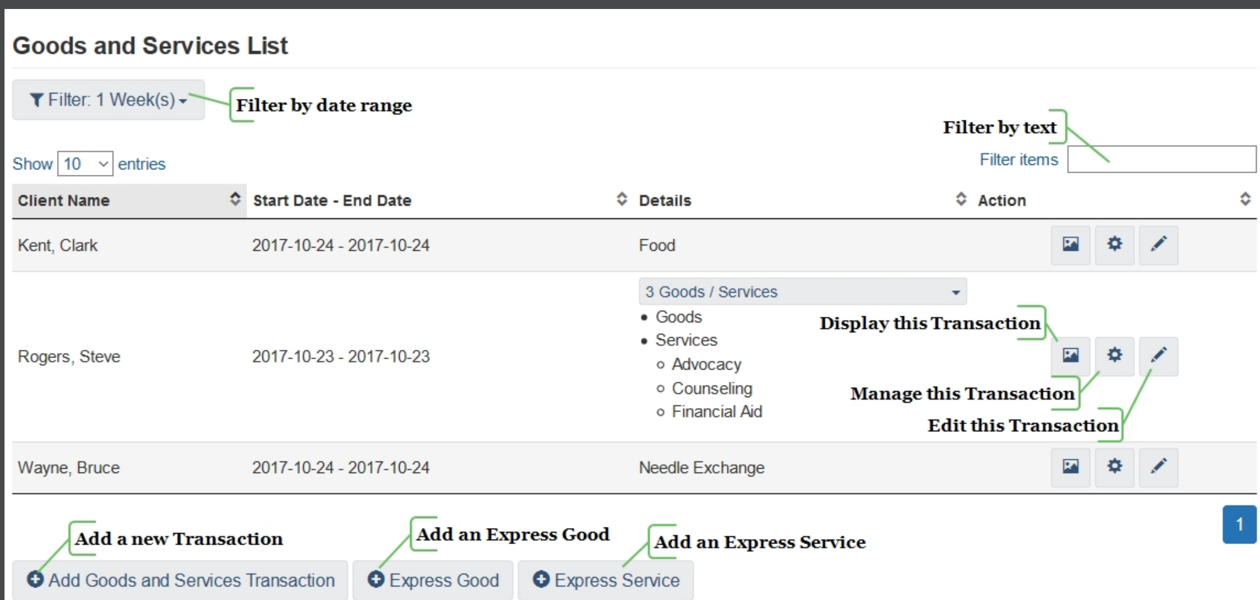
Now you're on the **Goods and Services List**

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**

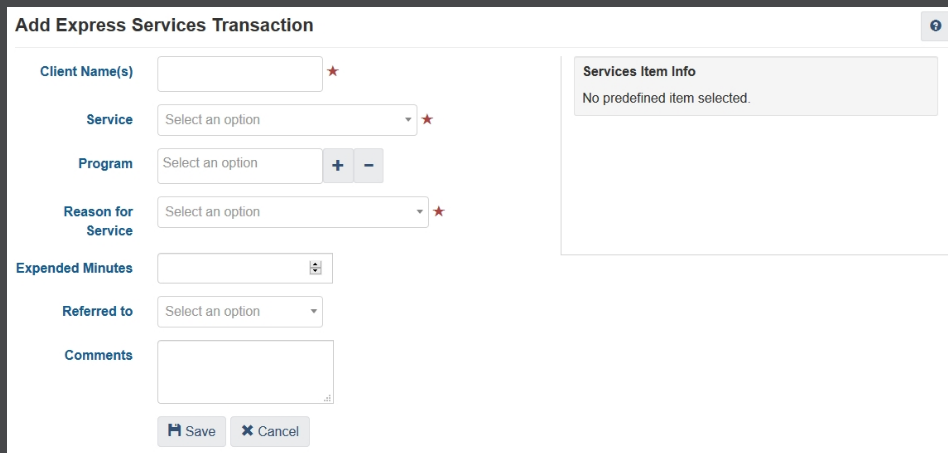


You can also Open a Client File (on page 1) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Add an Express Service

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

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



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

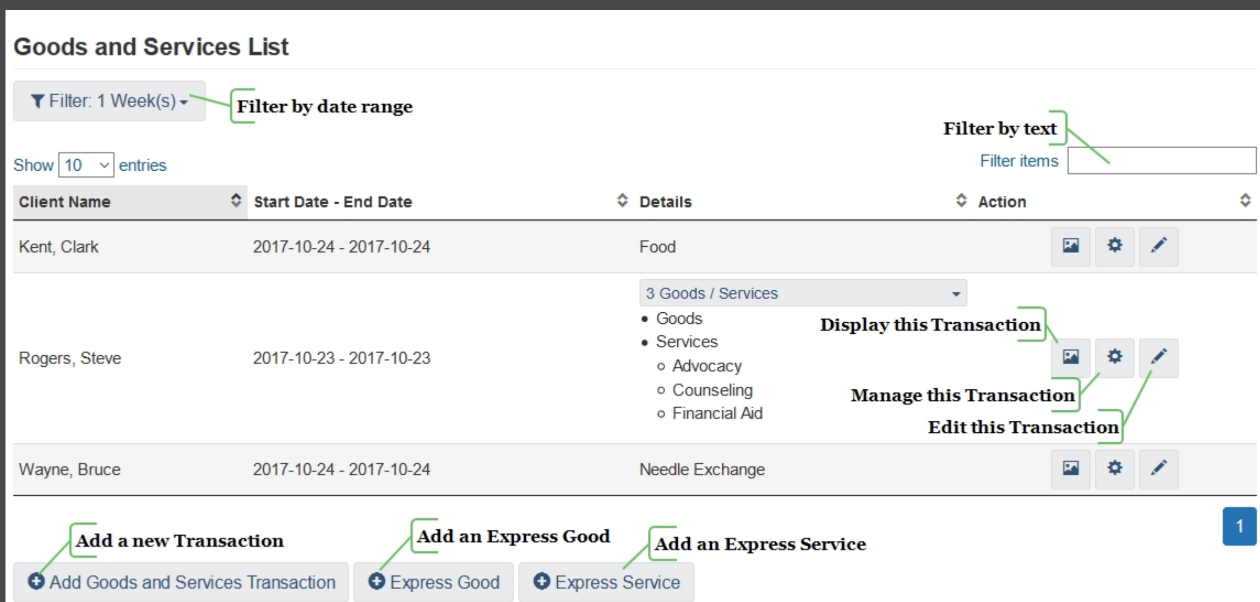
Now you're on the **Goods and Services List**

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**

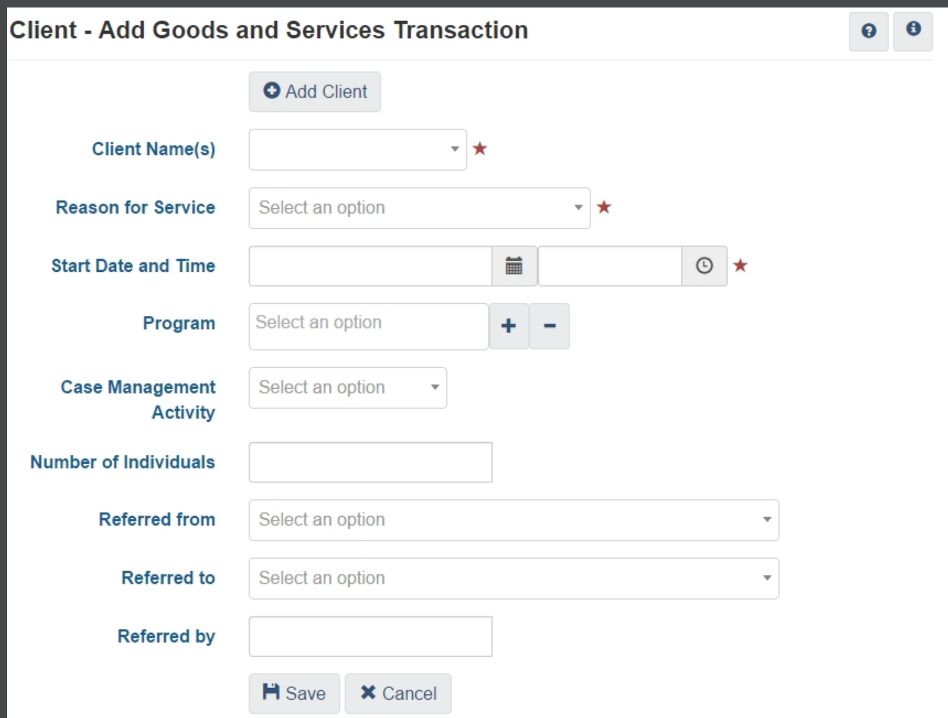
Now you're on the **Goods and Services List**



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



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

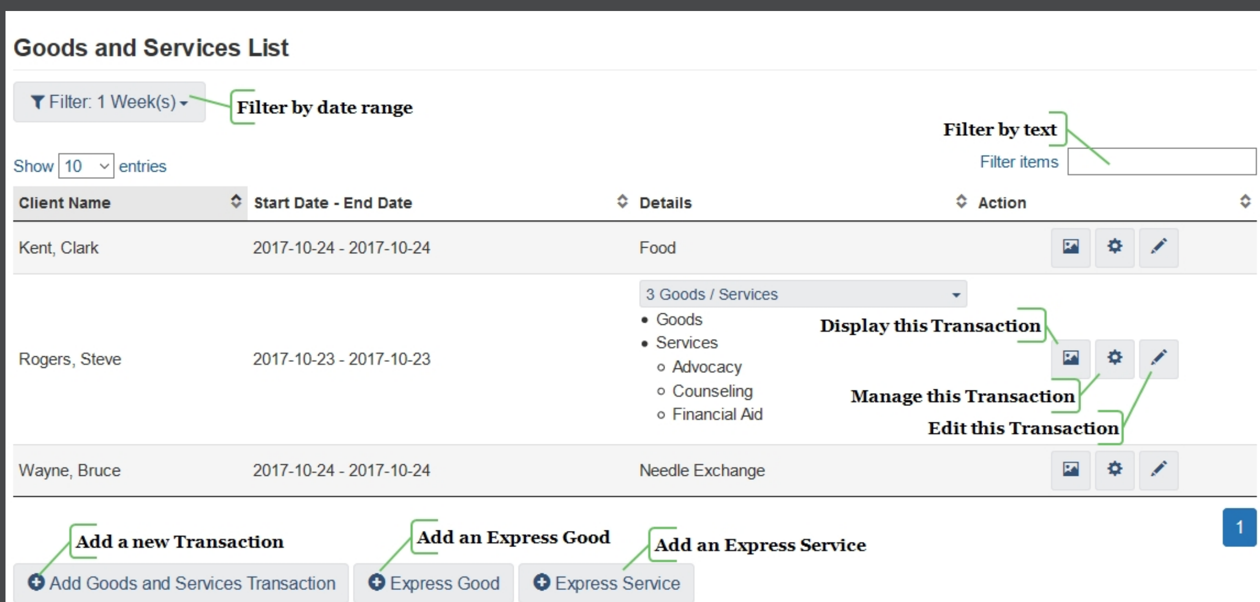
Now you're on the **Edit Goods and Services Transaction** Screen

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**



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

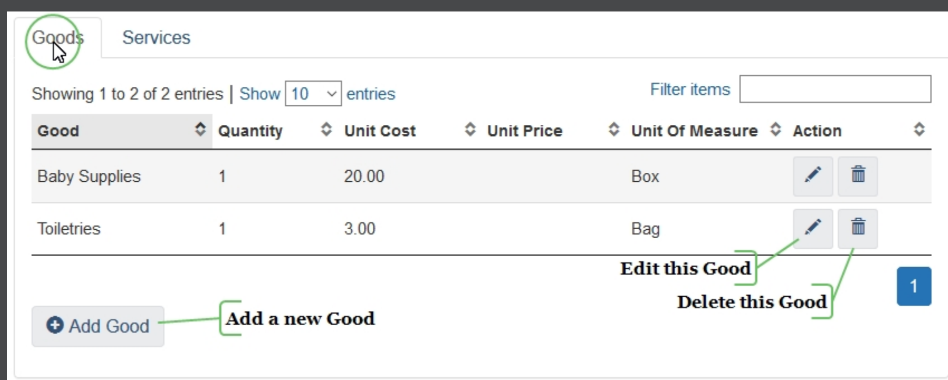
Manage a Goods and Services Transaction

See Manage an existing Goods and Services Transaction (on the previous page).

Go to Goods Tab

1. Click on the **GOODS** tab

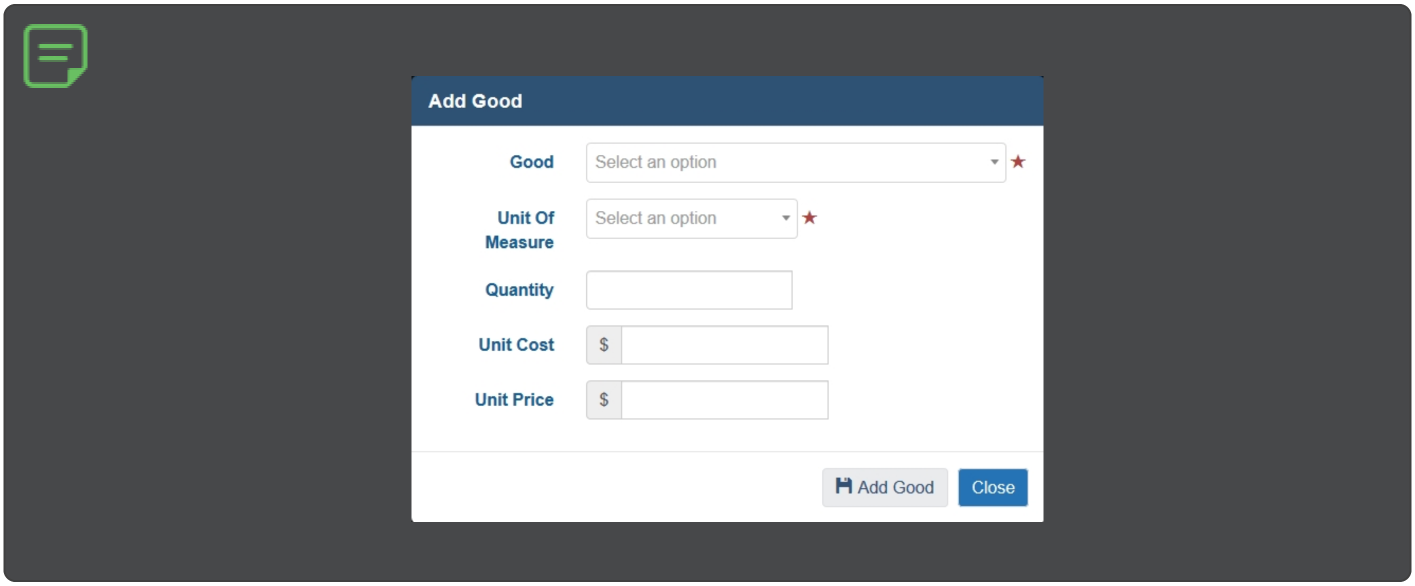
Now you're on the **Goods** Tab



Add a Good

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

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



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

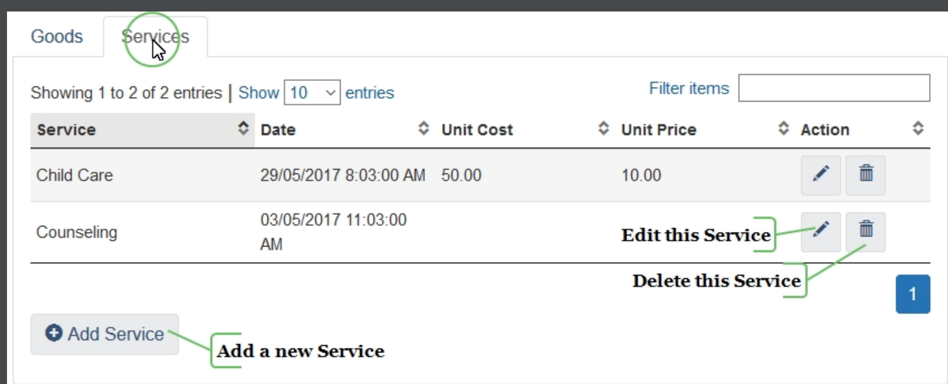
Manage a Goods and Services Transaction

See Manage an existing Goods and Services Transaction (on page 37).

Go to Services Tab

1. Click on the **SERVICES** tab

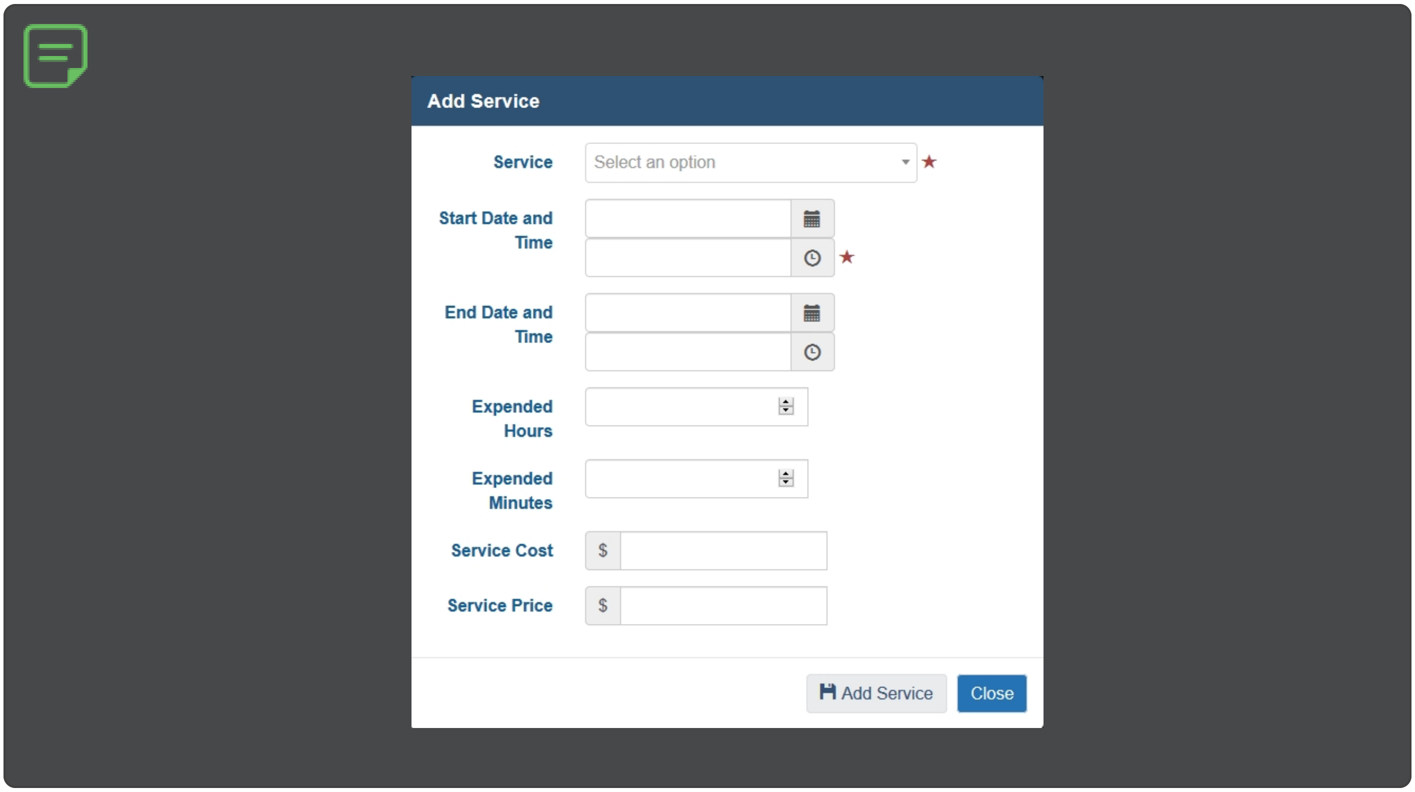
Now you're on the **Services** Tab



Add a Service

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

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



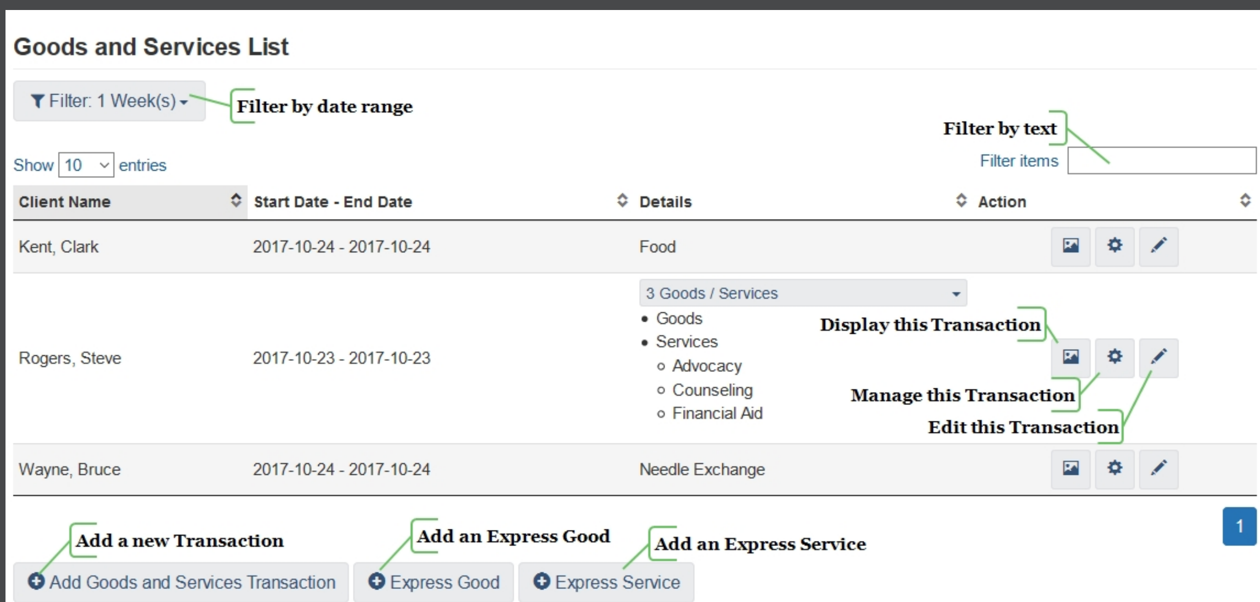
2. Select the Service from the drop-down list
3. Ensure that the Start Date and Time are correct
4. Optionally, enter an End Date and Time
5. Optionally, you may enter the expended amount of time that was spent delivering this Service
6. Optionally, you may enter the Cost of this Service
7. Optionally,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

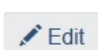
1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

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



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  for the record you would like to edit

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

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: Group Activities

Group activities are used to record instances when a service was provided to a group of clients at the same time. For example, it could be used to record Alcoholics Anonymous meetings, serving meals, or job training classes.

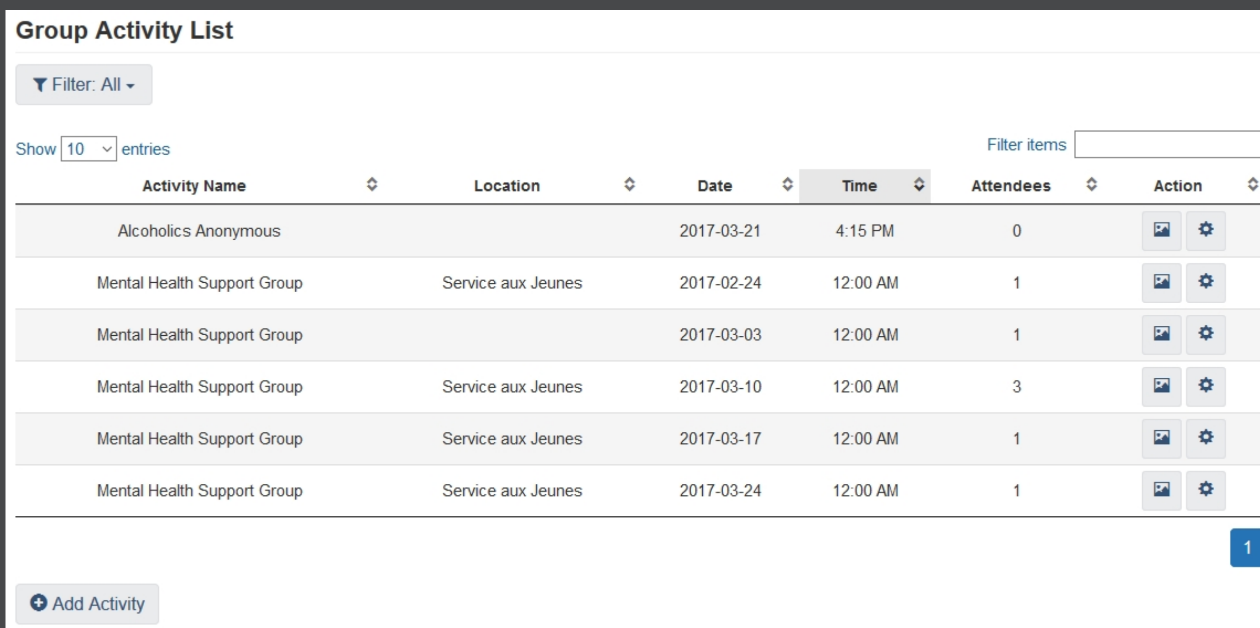
Chapter Contents

How To: Add a Group Activity

Go to the Group Activity List

1. Click on the **FRONT DESK MENU**
2. Click on **GROUP ACTIVITIES**

Now you're on the **Group Activity List**


Group Activity List

Filter: All

Show 10 entries

Filter items

Activity Name	Location	Date	Time	Attendees	Action
Alcoholics Anonymous		2017-03-21	4:15 PM	0	
Mental Health Support Group	Service aux Jeunes	2017-02-24	12:00 AM	1	
Mental Health Support Group		2017-03-03	12:00 AM	1	
Mental Health Support Group	Service aux Jeunes	2017-03-10	12:00 AM	3	
Mental Health Support Group	Service aux Jeunes	2017-03-17	12:00 AM	1	
Mental Health Support Group	Service aux Jeunes	2017-03-24	12:00 AM	1	

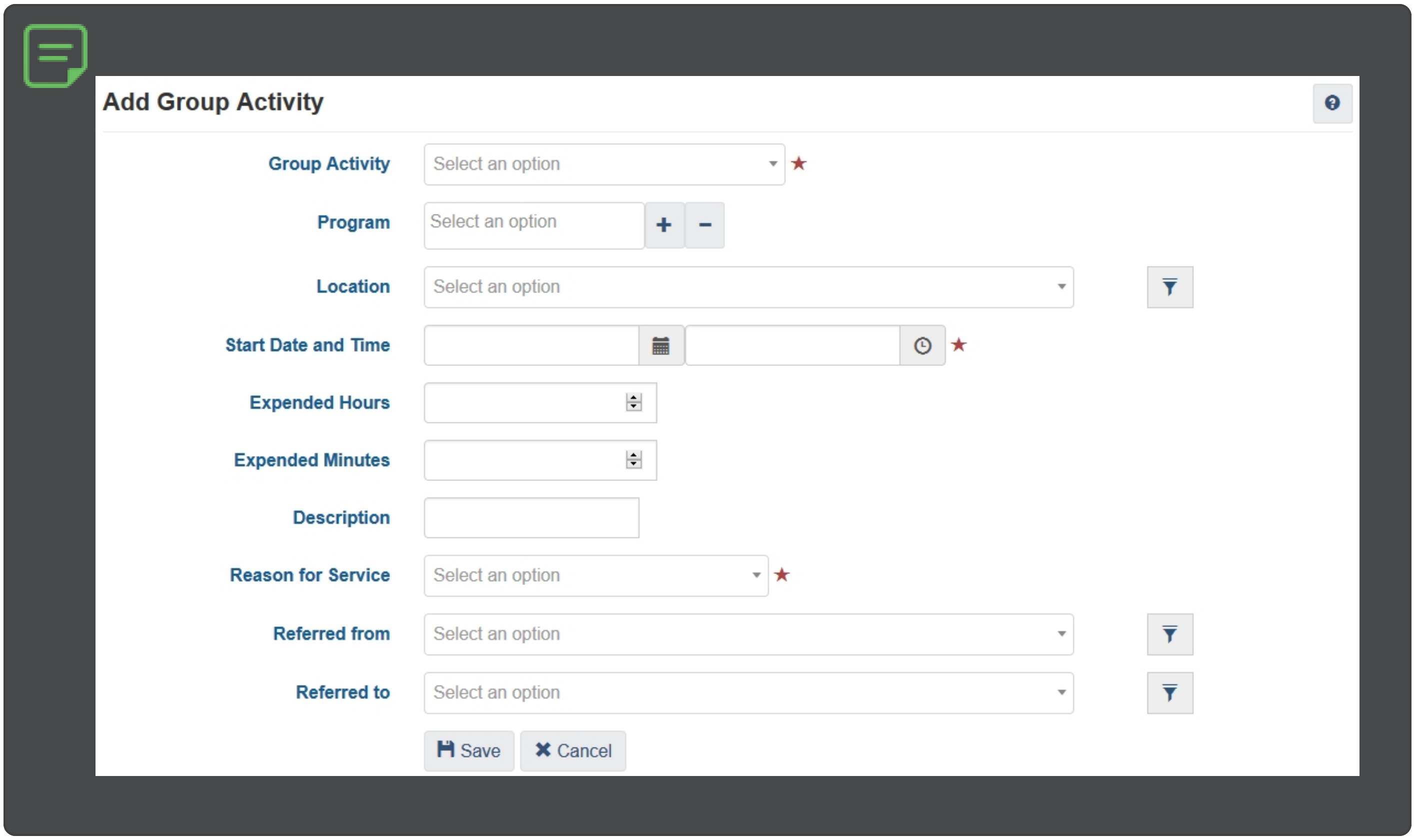
1

Add Activity

Add a Group Activity

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

Now you're on the **Add Group Activity** Screen



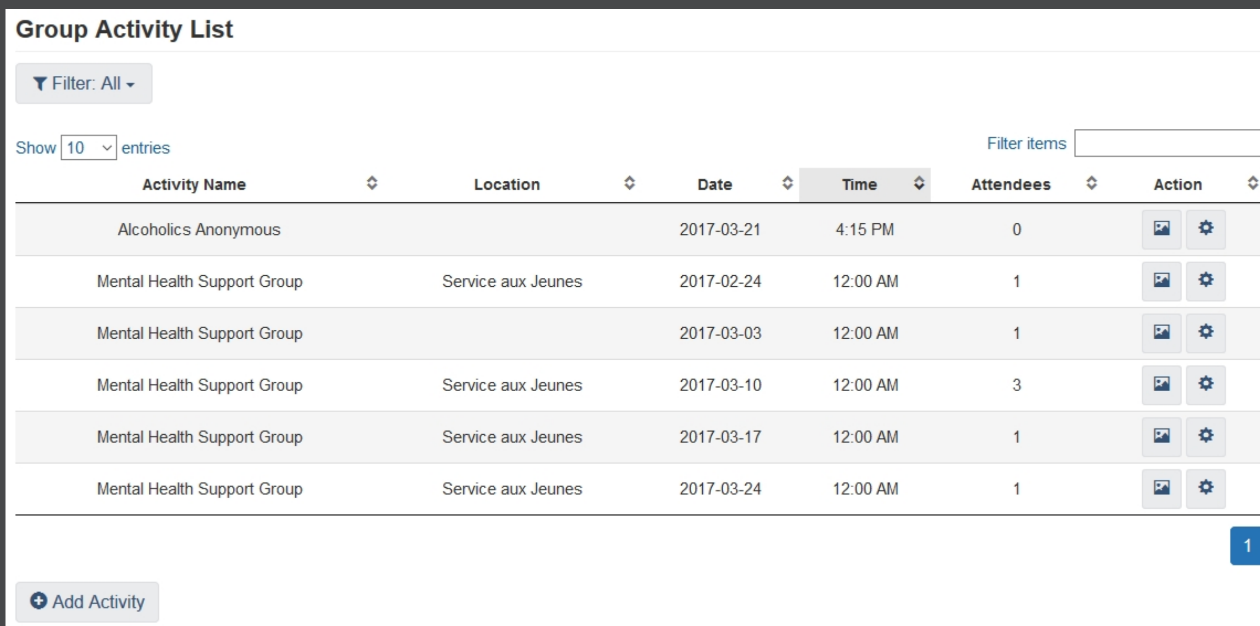
2. Select the type of Group Activity from the drop-down list
3. Select the Program(s) for this Group Activity
4. Select the Location for this Group Activity
5. Verify the Start Date and Time. The default value is the current date and time.
6. Enter the amount of time, in hours and minutes, that this Group Activity takes
7. Enter a description of this Group Activity
8. Select the Reason for Service. This will apply to every Client participating in this Group Activity.
9. Select where Clients at this Group Activity are Referred From. This will apply to every Client participating in this Group Activity.
10. Select where Clients at this Group Activity are Referred To. This will apply to every Client participating in this Group Activity.
11. Click **SAVE** when done

How To: Manage an Existing Group Activity

Go to the Group Activity List

1. Click on the **FRONT DESK MENU**
2. Click on **GROUP ACTIVITIES**

Now you're on the **Group Activity List**



Group Activity List

Filter: All

Show 10 entries — Filter items

Activity Name	Location	Date	Time	Attendees	Action
Alcoholics Anonymous		2017-03-21	4:15 PM	0	
Mental Health Support Group	Service aux Jeunes	2017-02-24	12:00 AM	1	
Mental Health Support Group		2017-03-03	12:00 AM	1	
Mental Health Support Group	Service aux Jeunes	2017-03-10	12:00 AM	3	
Mental Health Support Group	Service aux Jeunes	2017-03-17	12:00 AM	1	
Mental Health Support Group	Service aux Jeunes	2017-03-24	12:00 AM	1	

1

Add Activity

Manage a Record

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

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

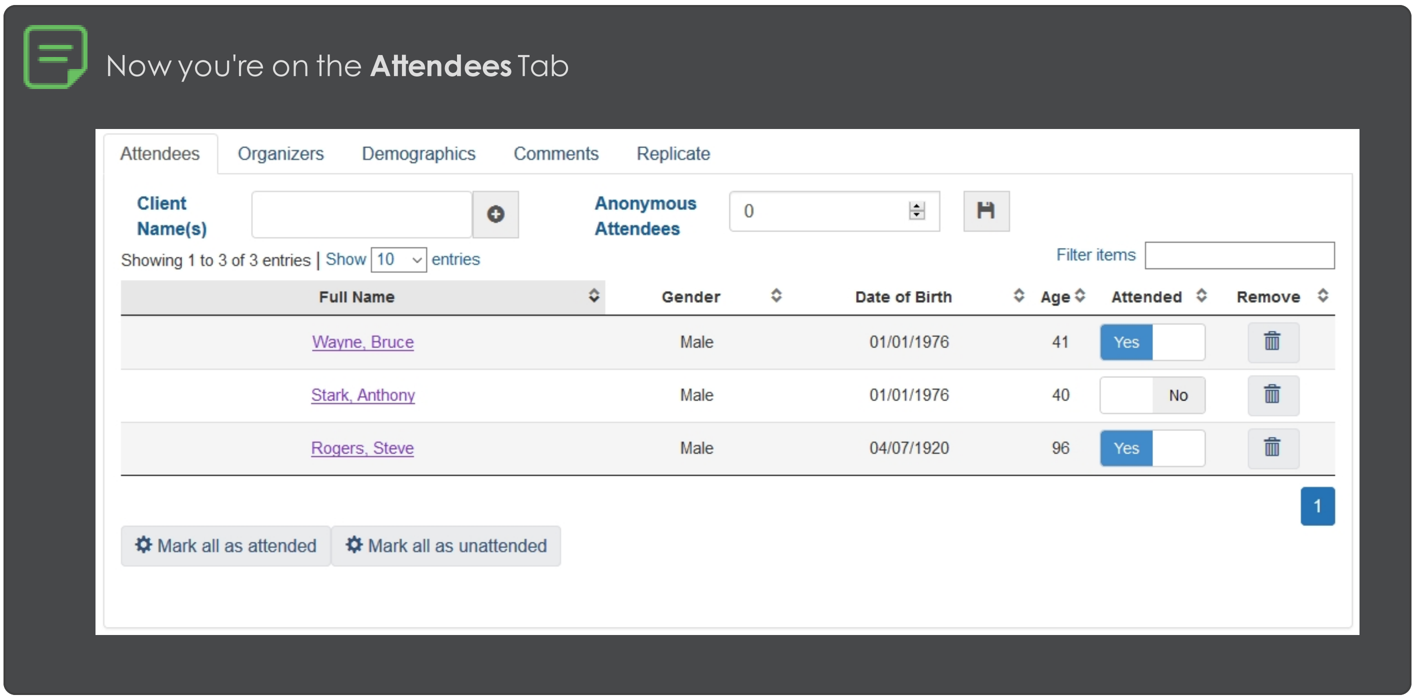
How To: Add Clients to a Group Activity as Attendees

Manage a Group Activity

See Manage an Existing Group Activity (on the previous page).

Go to Attendees Tab

1. Click on the **ATTENDEES** tab



Add Client Attendees

1. In the Client Name(s) field, select the Client(s) that you would like to add
2. Click the  button

How To: Mark a Single Client as Attended

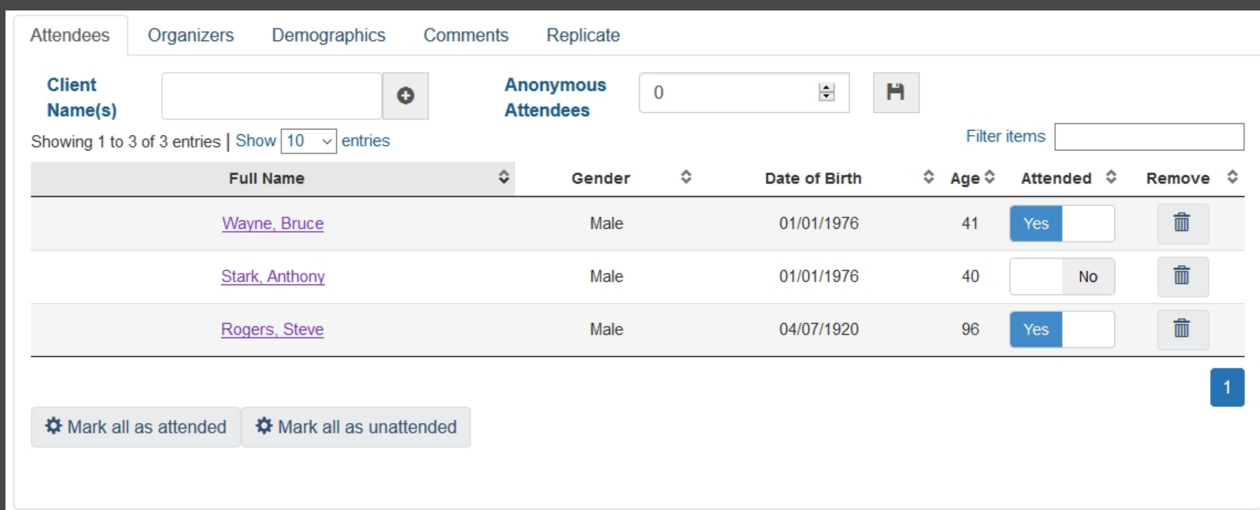
Manage a Group Activity

See Manage an Existing Group Activity (on page 47).

Go to Attendees Tab

1. Click on the **ATTENDEES** tab

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



Mark a Single Client as Attended

1. Find the Client you would like to record has attended
2. Next to the Client's name, toggle the Attended field to "Yes"

How To: Mark All Clients as Attended

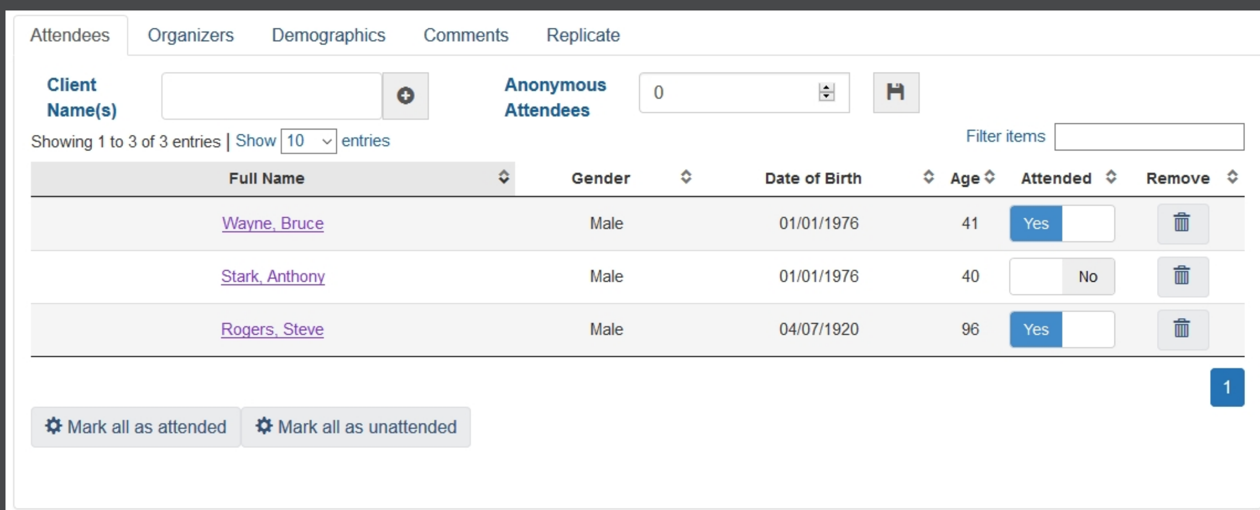
Manage a Group Activity

See Manage an Existing Group Activity (on page 47).

Go to Attendees Tab

1. Click on the **ATTENDEES** tab

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



Mark all Clients as Attended

1. Click the **MARK ALL AS ATTENDED** button

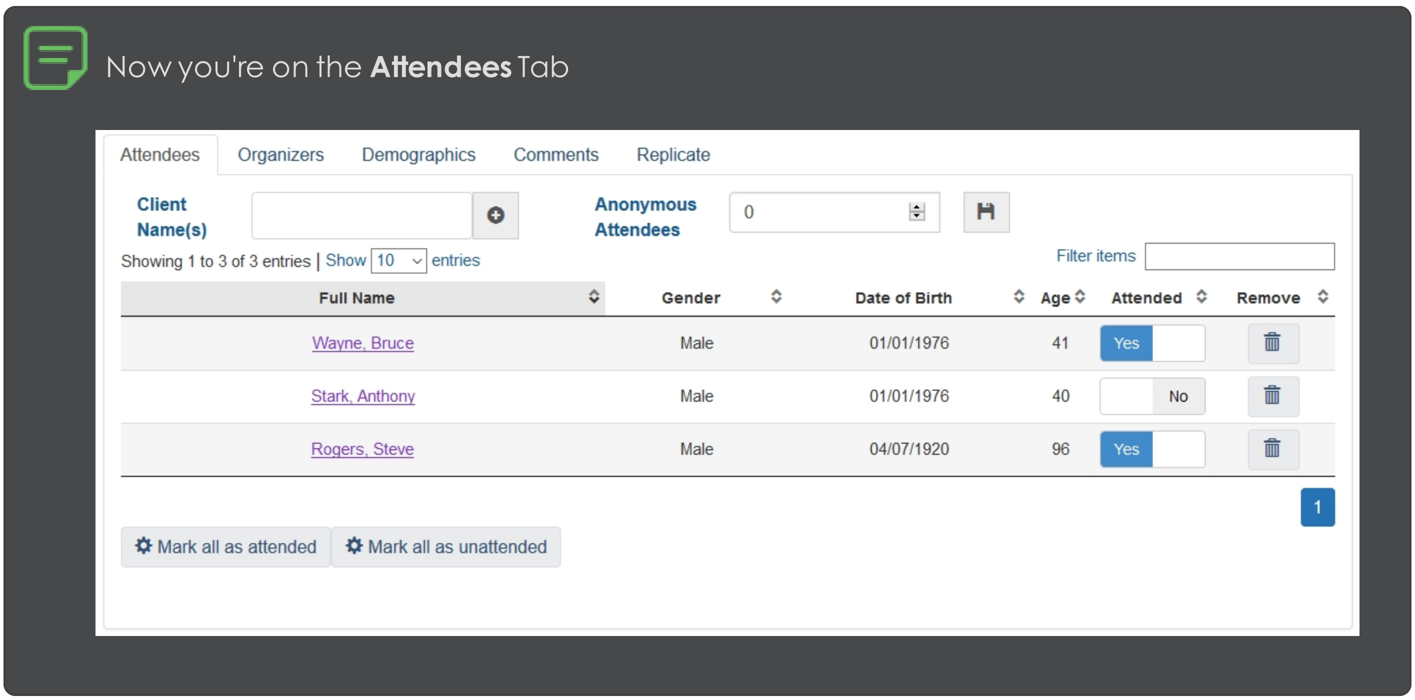
How To: Add Anonymous Attendees to a Group Activity

Manage a Group Activity

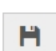
See Manage an Existing Group Activity (on page 47).

Go to Attendees Tab

1. Click on the **ATTENDEES** tab



Add Anonymous Attendees

1. In the Anonymous Attendees field, enter the number of non-Client attendees you had
2. Click the  button

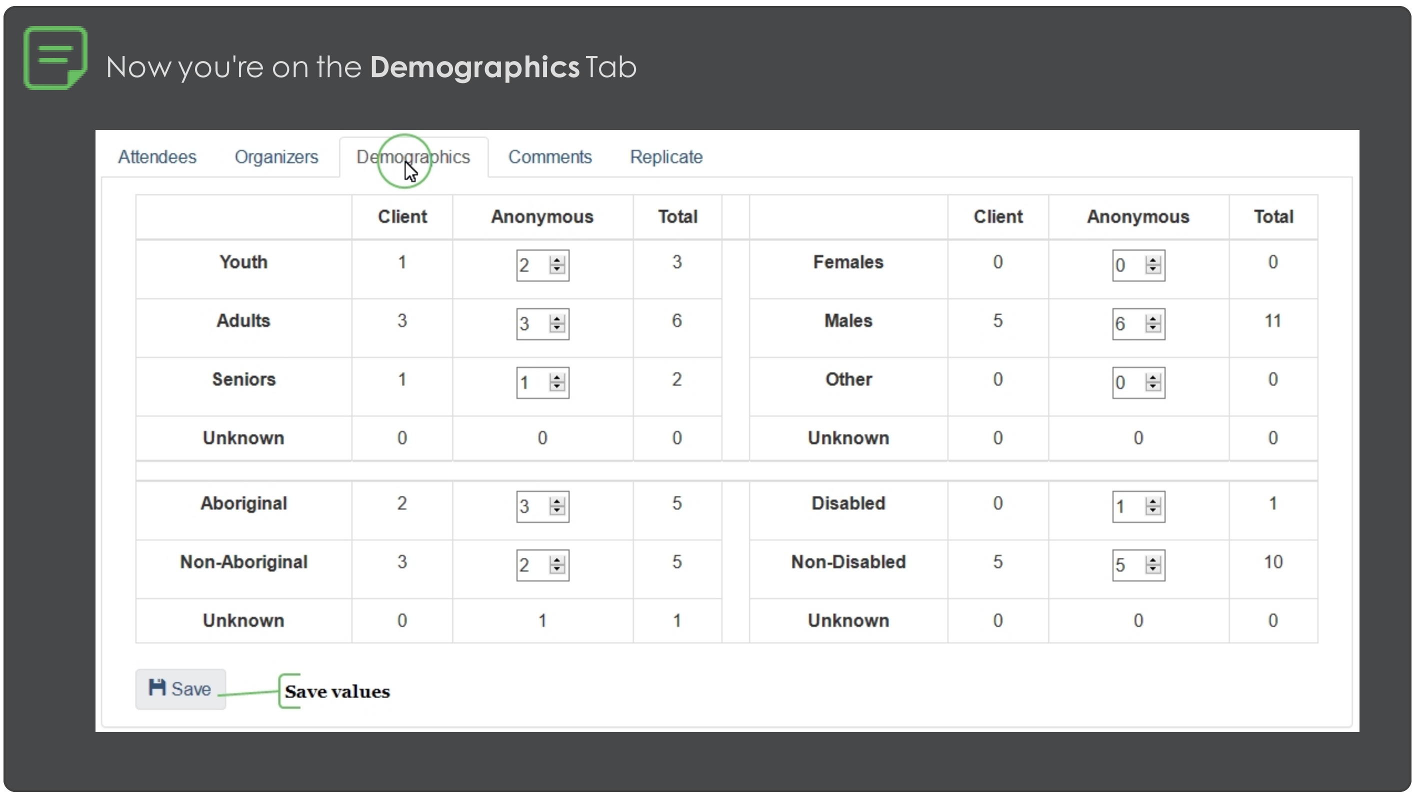
How To: Track Demographics of Attendees at a Group Activity

Manage a Group Activity

See Manage an Existing Group Activity (on page 47).

Go to Demographics Tab

1. Click on the **DEMOGRAPHICS** tab



Track Demographics

1. In the Anonymous column, type in the number of Youth, Adults, and Seniors that attended the event
2. In the Anonymous column, type in the number of Females, Males, and Other people that attended the event
3. In the Anonymous column, type in the number of Aboriginal and Non-Aboriginal people that attended the event
4. In the Anonymous column, type in the number of Disabled and Non-Disabled people that attended the event
5. Click **SAVE** when done

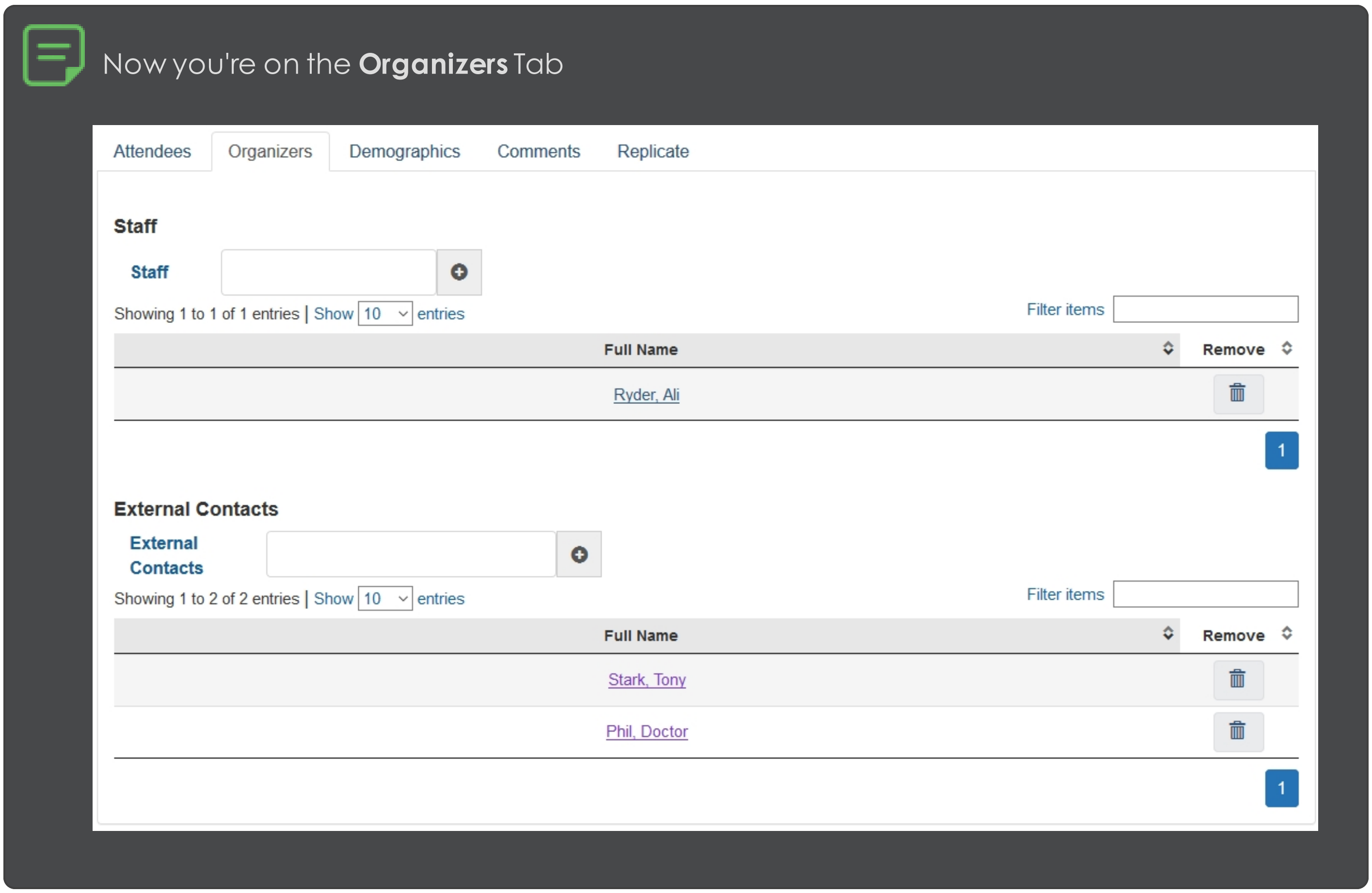
How To: Add Staff to a Group Activity as Organizers

Manage a Group Activity

See Manage an Existing Group Activity (on page 47).

Go to Organizers Tab

1. Click on the **ORGANIZERS** tab



Add Staff to the Group Activity

1. In the Staff field, select the Staff that you would like to add
2. Click the + button

How To: Add External Organizers to a Group Activity

In order to add an External Contact, they must first exist in the **People List**. If they don't already, you must first Add a Person (on page 1) before you can add them as an External Contact.

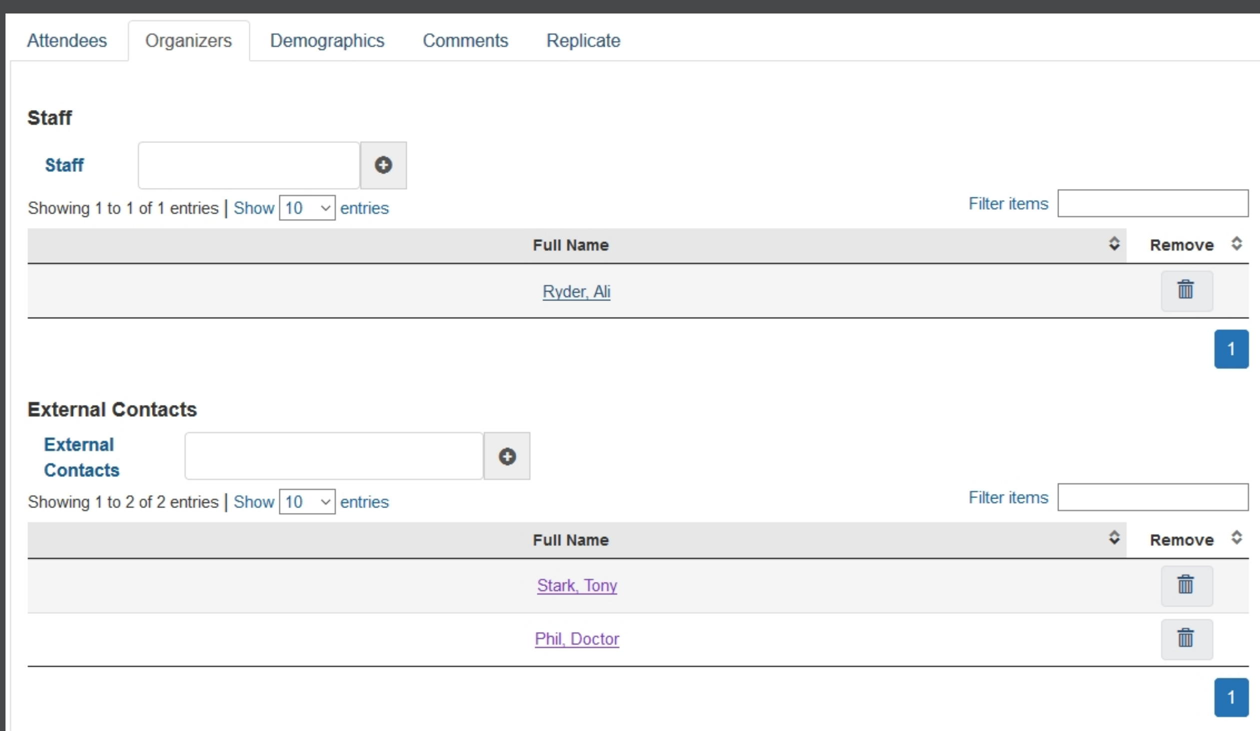
Manage a Group Activity

See Manage an Existing Group Activity (on page 47).

Go to Organizers Tab

1. Click on the **ORGANIZERS** tab

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



Add External Contacts to the Group Activity

1. In the External Contacts field, select the External Contacts that you would like to add
2. Click the + button

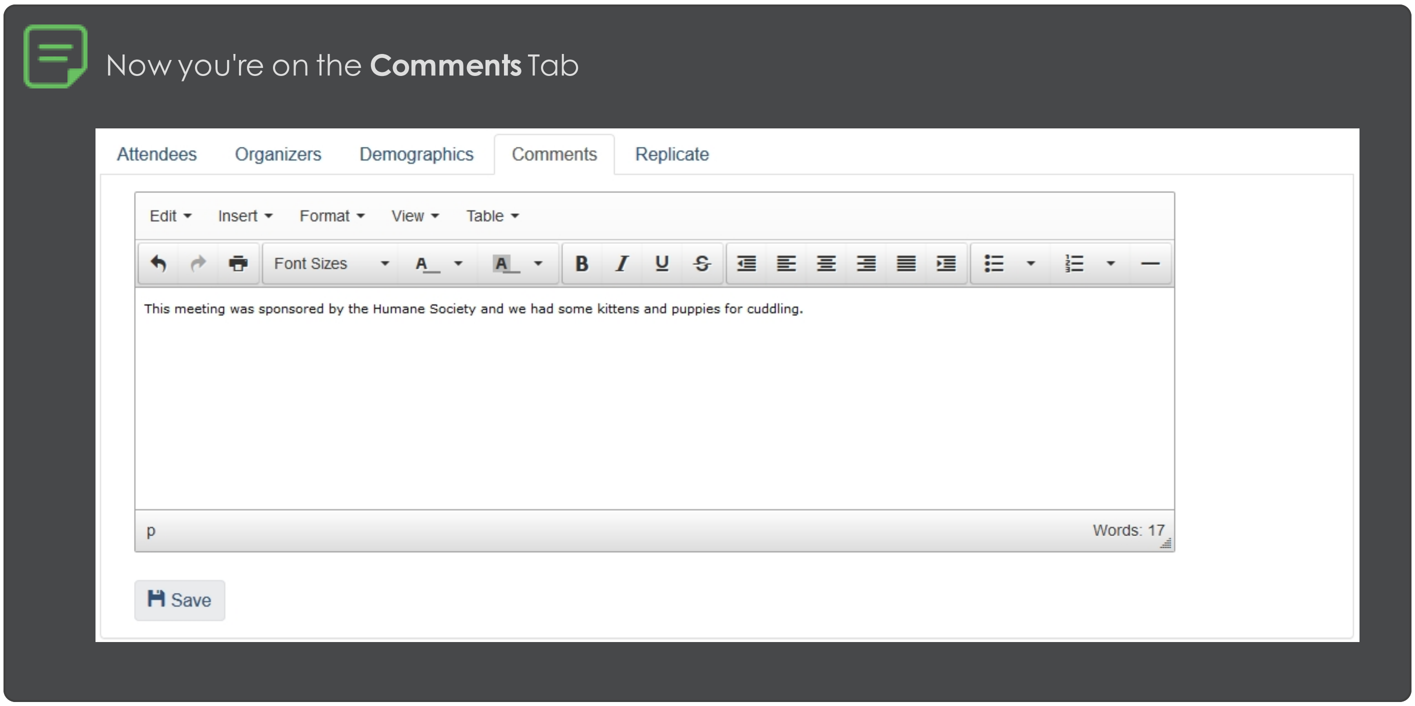
How To: Add Comments to a Group Activity

Manage a Group Activity

See Manage an Existing Group Activity (on page 47).

Go to Comments Tab

1. Click on the **COMMENTS** tab



Add Comment

1. Enter some Comments
2. Click **SAVE** when done

How To: Duplicate a Group Activity

Manage a Group Activity

See Manage an Existing Group Activity (on page 47).

Go to Replicate Tab

1. Click on the **REPLICATE** tab

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

Replicate Group Activity

1. Indicate whether you would like to duplicate the list of Attendees for this Group Activity
2. Indicate whether you would like to duplicate the list of Organizers for this Group Activity
3. In the Dates field, click on the date(s) you would like to run the Group Activity on
4. Click the **REPLICATE** button

CHAPTER 5: Assessments

Chapter Contents

How To: Add a VI-SPDAT

Go to the SPDAT List

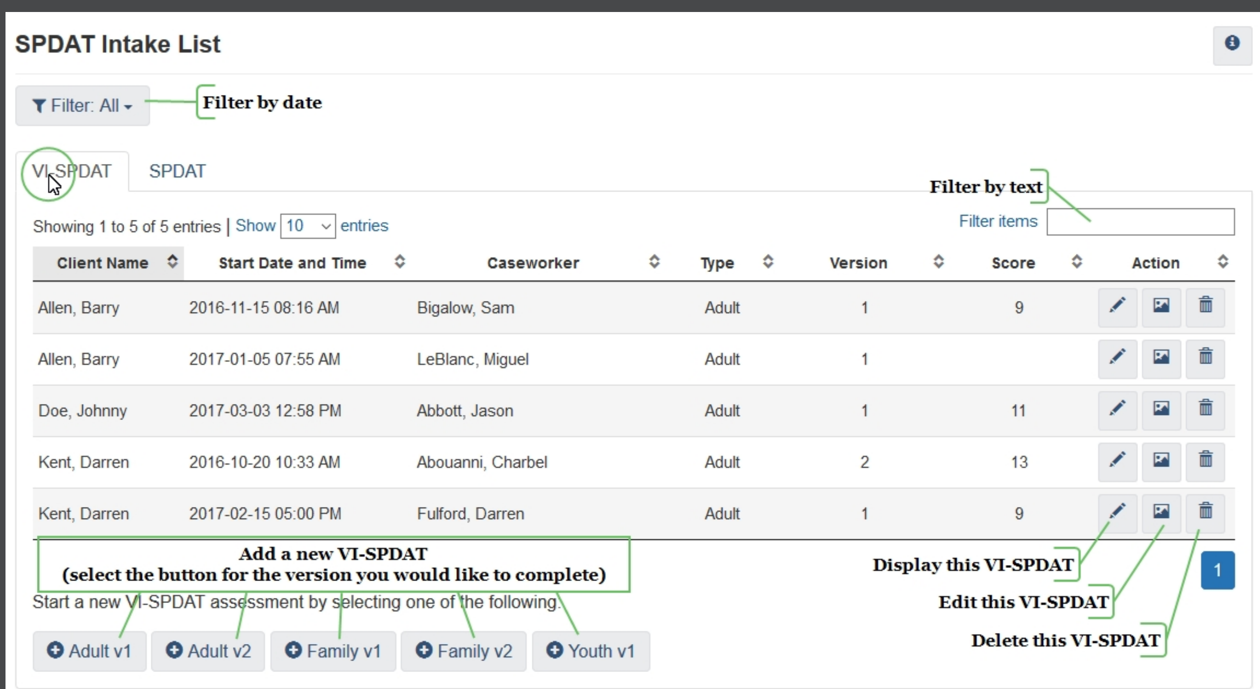
1. Click on the **FRONT DESK MENU**
2. Click on **ASSESSMENTS**
3. Click on **SPDAT**

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

Go to the VI-SPDAT Tab

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

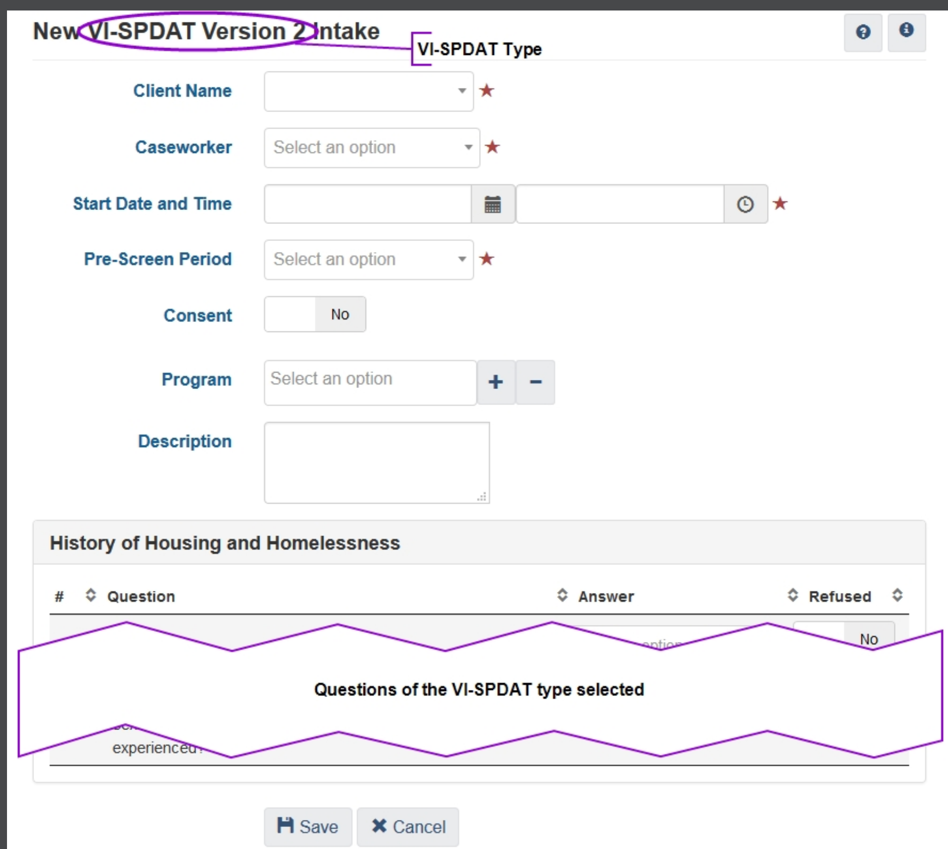
Now you're on the **VI-SPDAT** Tab



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



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?

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

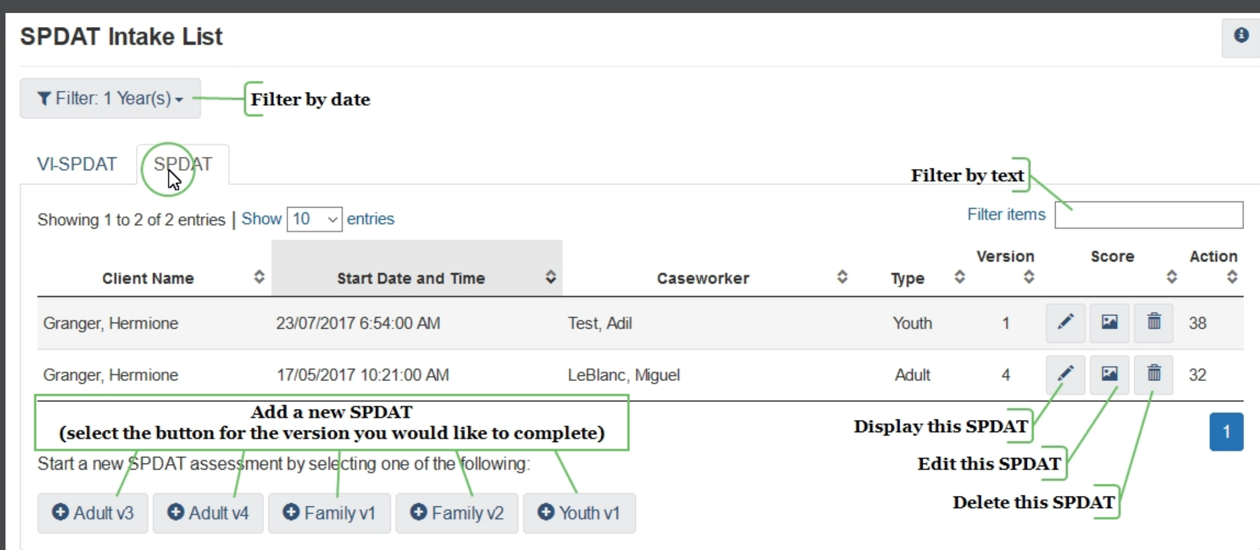
1. Click on the **FRONT DESK MENU**
2. Click on **ASSESSMENTS**
3. Click on **SPDAT**

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

Go to the SPDAT Tab

1. Click on the **SPDAT** tab

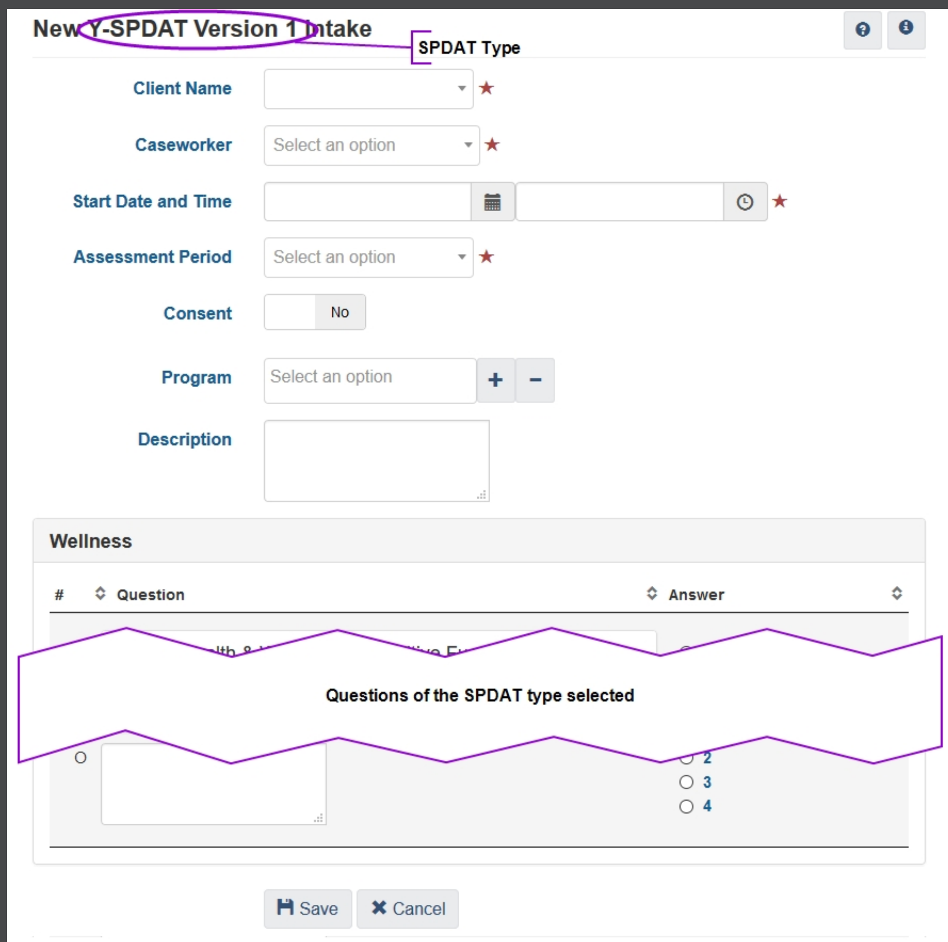
Now you're on the **SPDAT** tab



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)

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



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

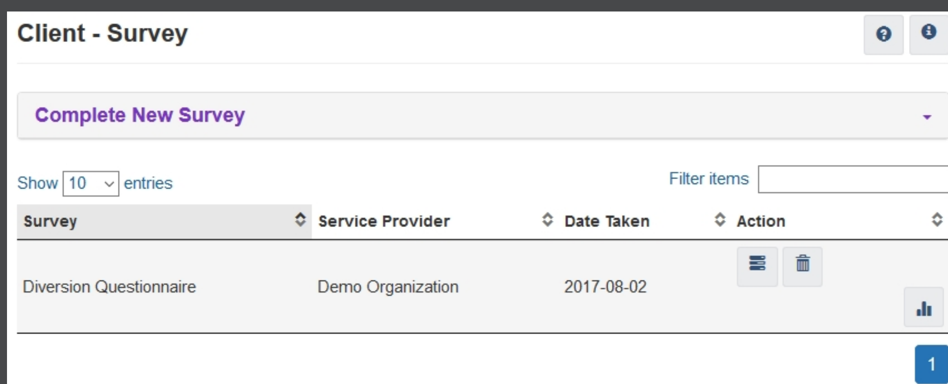
Open a Client File

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**

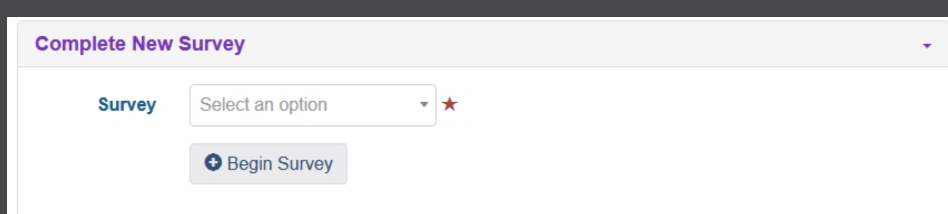
Now you're on the **Client - Survey** screen



Add a Survey

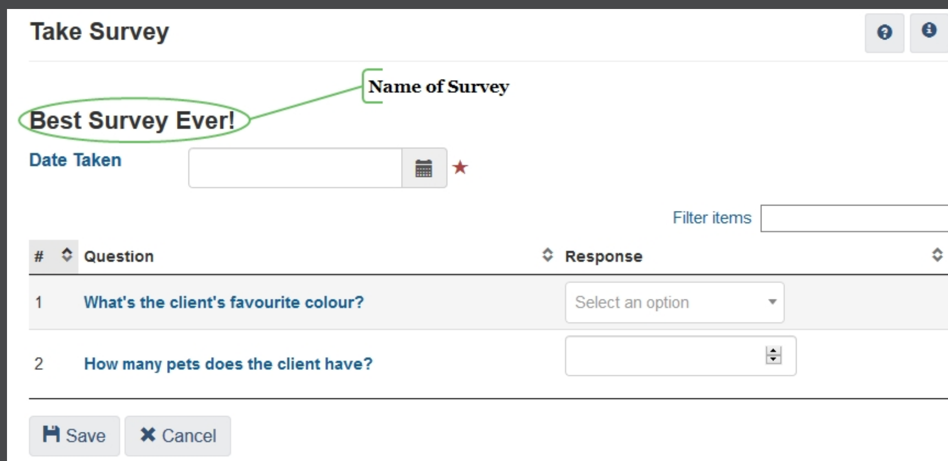
1. Click on **COMPLETE NEW SURVEY**

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



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

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



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 6: 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.

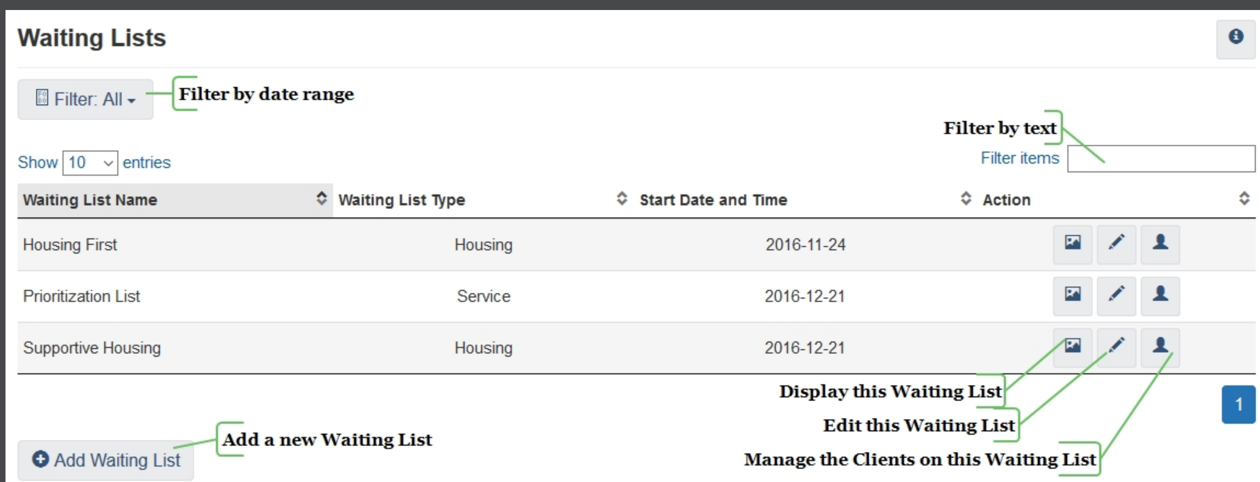
Chapter Contents

How To: See who is on a Waiting List

Go to the Waiting Lists

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

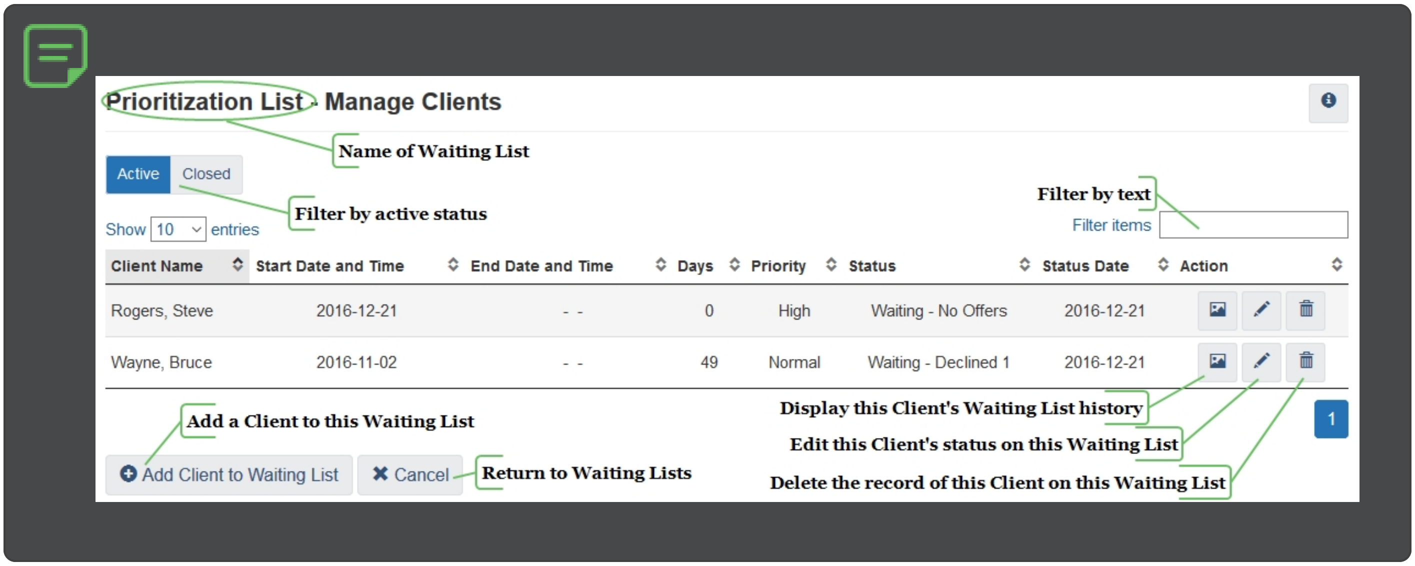
Now you're on the **Waiting Lists** Screen



Manage Clients

1. Click on the  button

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


Prioritization List - Manage Clients
Name of Waiting List
Active
Closed
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
1
Add Client to Waiting List
Cancel
Return to Waiting Lists
Delete the record of this Client on this Waiting List

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

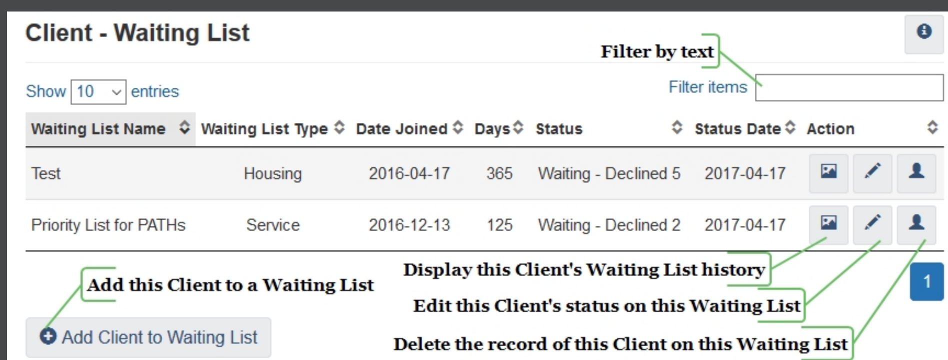
Open a Client File

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



How To: Add a Client to a Waiting List

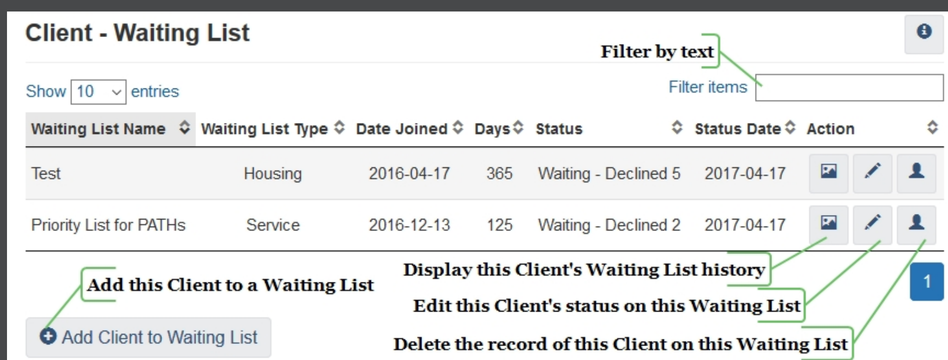
Open a Client File

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

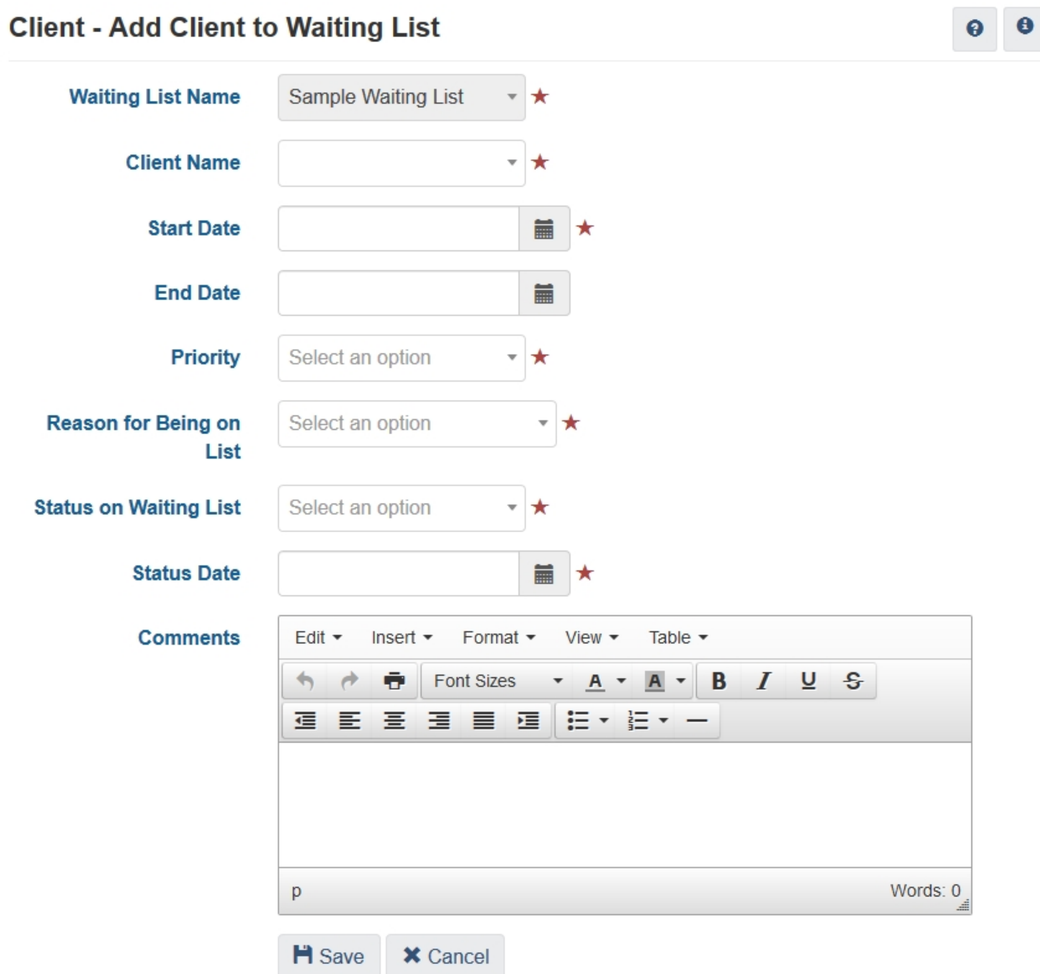
1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **WAITING LISTS**

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



Add Client to a Waiting List

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



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

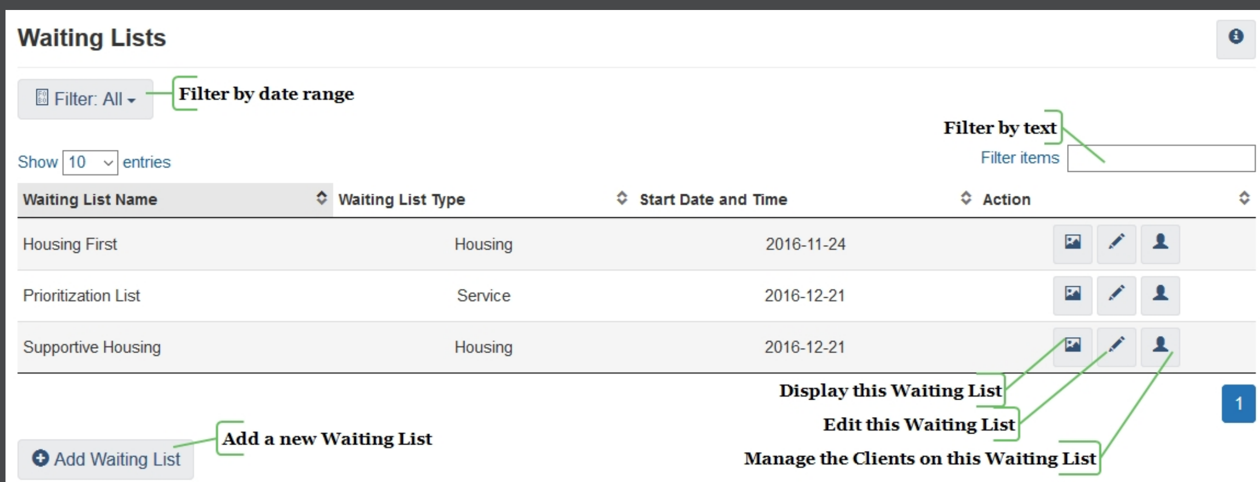
Now you're on the **Manage Clients Screen**

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**

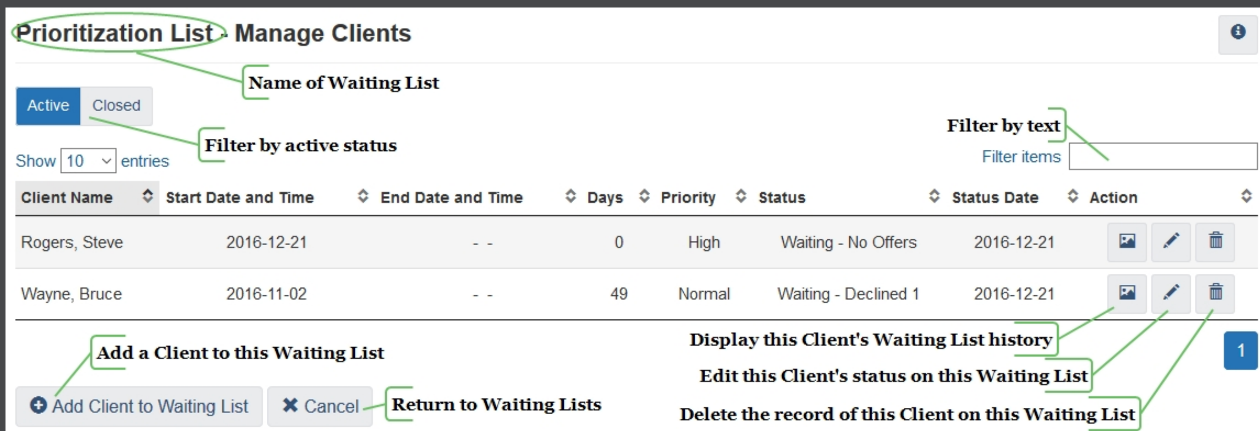
Now you're on the **Waiting Lists** Screen



Manage Clients

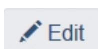
1. Click on the button

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



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

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

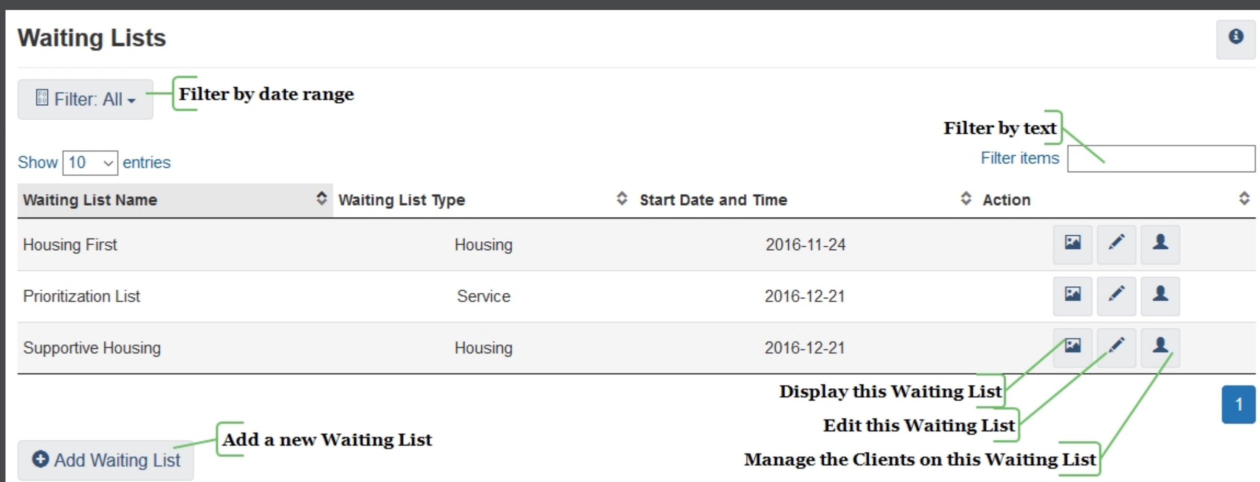
Now you're on the **Manage Clients** Screen

How To: Remove a Client from a Waiting List

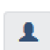
Go to the Waiting Lists

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

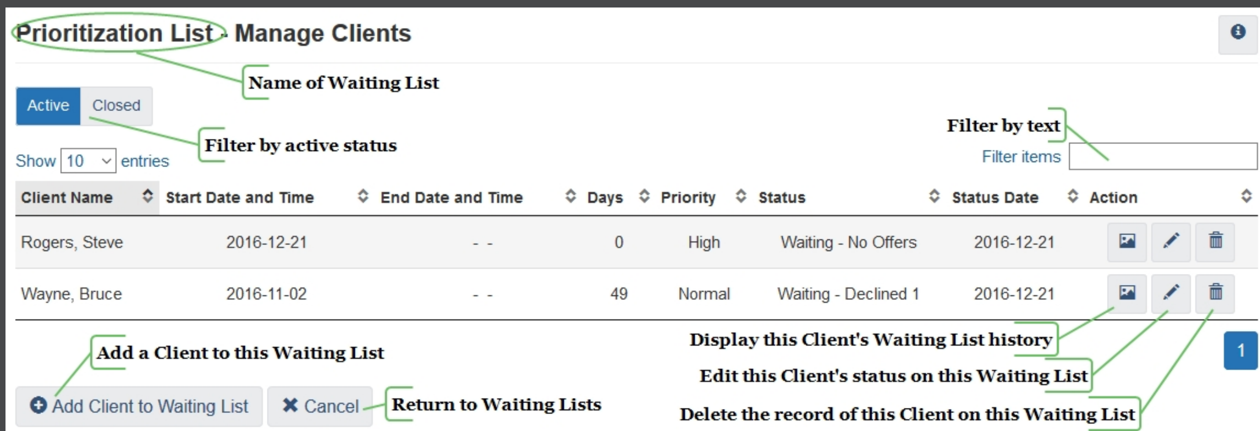
Now you're on the **Waiting Lists** Screen



Manage Clients

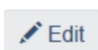
1. Click on the  button

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



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