

# DATA SHARING IN HIFIS 4

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*DISCLAIMER: While we have made every effort to ensure that all the information within this document is accurate and up-to-date, it should not be considered official documentation, nor is it guaranteed to be without errors. This document is intended to guidelines only to communities unfamiliar with HIFIS 4. You should conduct your own thorough testing of the software to ensure it behaves exactly as you expect. ACRE Consulting assumes no responsibility for how this document is used or for any decisions made based on its contents. Whenever there is a conflict between this document and any official documentation published by Employment and Social Development Canada (ESDC), the latter should be considered to be correct. Furthermore, the behaviour of the software is subject to change without notice, so what was once true may no longer be true after a software version update.*

A guide for communities looking to use the Homeless Individuals and Families Information System (HIFIS) version 4. This document covers the various data components stored within the HIFIS 4 database and how these data points are shared between users.

# Table of Contents

- 1. Service Providers ..... 3
- 2. Clusters ..... 4
  - 2.1. Integrated Systems ..... 4
  - 2.2. Partially Clustered ..... 4
  - 2.3. Isolated ..... 5
- 3. Client Visibility ..... 6
  - 3.1. Service Provider Visibility Settings ..... 6
  - 3.2. Declined Consent (Anonymous) Clients ..... 6
  - 3.3. Hidden Clients ..... 6
- 4. User Rights ..... 7
- 5. Client Vitals ..... 9
- 6. Client Consent ..... 10
- 7. Client Information ..... 11
  - 7.1. Aboriginal Status ..... 12
  - 7.2. Behavioural Risk Factors ..... 12
  - 7.3. Contact Information ..... 12
  - 7.4. Contacts ..... 12
  - 7.5. Contributing Factors ..... 12
  - 7.6. Dietary Requirements ..... 13
  - 7.7. Distinguishing Features ..... 13
  - 7.8. Education ..... 13
  - 7.9. Family ..... 13
  - 7.10. Housing History ..... 13
  - 7.11. Identification ..... 14
  - 7.12. Languages ..... 14
  - 7.13. Life Events ..... 14
  - 7.14. Physical Appearance ..... 15
  - 7.15. Profile Picture ..... 15
  - 7.16. Risk of Homelessness ..... 15
  - 7.17. Vehicles ..... 15
  - 7.18. Veteran Service ..... 15
  - 7.19. Watch Concerns ..... 16



8.	Client Documents.....	17
8.1.	Documents .....	18
9.	Shareable Client Information.....	19
9.1.	Comments.....	19
9.2.	Financial Assets.....	19
9.3.	Financial Debt.....	19
9.4.	Financial Expenses .....	20
9.5.	Financial Income .....	20
9.6.	Health.....	20
9.7.	Medication.....	20
10.	Client Services .....	22
10.1.	Admissions.....	22
10.2.	Appointments .....	23
10.3.	Calls and Visits Log .....	23
10.4.	Case Management.....	23
10.5.	Chores .....	24
10.6.	Conflicts.....	24
10.7.	Food Banks.....	24
10.8.	Goods and Services .....	24
10.9.	Group Activities.....	25
10.10.	Housing Loss Prevention.....	25
10.11.	Housing Placement .....	26
10.12.	Incidents.....	27
10.13.	Medication Dispensing.....	27
10.14.	Service Restrictions.....	28
10.15.	Service Prioritization Decision Assistance Tool (SPDAT) .....	28
10.16.	Storage .....	28
10.17.	Surveys .....	29
10.18.	Turn Aways.....	29
10.19.	Vulnerability Assessment Tool (VAT).....	29
10.20.	Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT).....	29
10.21.	Waiting Lists.....	30

# 1. Service Providers

The first important concept that is necessary to understanding data sharing in HIFIS 4 is that of the Service Provider.

A Service Provider is defined by HIFIS as “an organization that provides services such as shelter or food to clients who are homeless or at risk of becoming homeless.” However, this definition is not precisely true.

A Service Provider can be understood as a way of grouping the provision of services together. For example, an emergency shelter might be a single Service Provider in HIFIS 4 because it provides a logical grouping of services: shelter beds, and shelter-related services. However, the organization that operates the emergency shelter might also operate some transitional housing units and offer case management to the people in the transitional housing. The transitional housing division of the organization might be a second Service Provider in HIFIS 4.

The exact definition of the difference between a Service Provider and an organization is murky. Each community might find that a different definition works better for them.

However, for the purposes of understanding data sharing, the key point is this:

**In general, more data is shared within a single Service Provider than between two Service Providers.** Also, as a general rule, there are only two states for data sharing: within a Service Provider, or outside of a Service Provider. HIFIS 4 does not, at the time of writing, accommodate a concept where there are two “sister” Service Providers that share more data with each other than with other organizations.

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### **EXAMPLE:**

*A client has a case file open at Service Provider A. All caseworkers at Service Provider A will be able to see all of the details of this case file, including case notes and activities. Caseworkers at other Service Providers will only be able to see limited information about this case. They will be able to see that it exists, but they will not be able to read the case notes.*

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## 2. Clusters

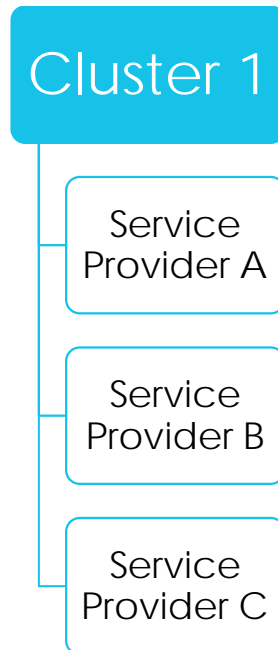
A Cluster is a HIFIS 4 term that can be defined as a subgrouping within the HIFIS 4 database.

**Each Cluster contains one or more Service Providers. This Cluster of Service Providers has a shared pool of Clients. Service Providers within this Cluster can see and interact with Clients in this shared pool. Service Providers belonging to another Cluster are not even aware of the existence of Clients in other Clusters. Service Providers within one Cluster cannot detect the activities of Service Providers within other Clusters. There is no crossover between Clusters.**

In general, the state of Clustering within a HIFIS 4 installation can be described in one of three ways:

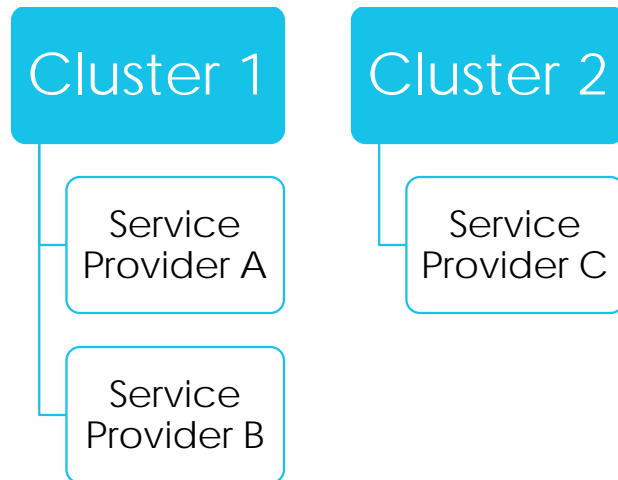
### 2.1. Integrated Systems

A fully integrated system comprises of only one Cluster.



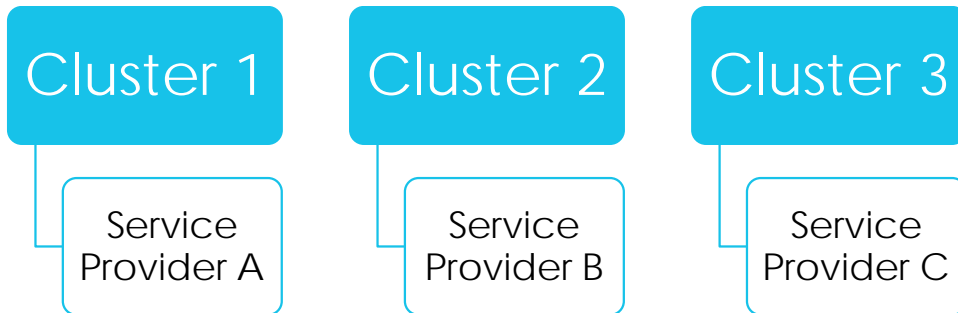
### 2.2. Partially Clustered

A partially Clustered system comprises of at least two Clusters, and at least one of those Clusters contains at least two Service Providers.



### 2.3. Isolated

A fully isolated system comprises of multiple Clusters, each containing only one Service Provider.



## 3. Client Visibility

As established, all clients **exist** within a Cluster. However, not all Clients are **visible** to everyone, even within a Cluster. **The key distinction here is that a client may exist within a Cluster, but not be visible; these are referred to Invisible Clients.**

Invisible Clients can be seen by some within the Cluster, but to those who cannot see the Client, they will not be able to access the Client's file in any way or provide services to them. Even if someone who cannot see a particular Invisible Client searches directly for the Client, the search will return no results.

Note that Invisibility is a situational state. A client may be Invisible to some users but visible to others.

There are three ways where a Client may be treated as Invisible:

### 3.1. Service Provider Visibility Settings

A particular Service Provider can be configured to be able to view, or not view, clients who are Adult Males, Adult Females, Youth, and/or Children. The ages of each group can also be configured.

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**EXAMPLE:**

*Service Provider A deals exclusively with youth, aged 16-24. Their settings can be configured such that clients who fall outside of this age range are Invisible.*

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### 3.2. Declined Consent (Anonymous) Clients

There is a Cluster setting called *Enforce Consent*. With this setting turned on, users are prompted to record a Consent record for the Client at the time of Client creation. If using the *Enforce Consent* setting, when a Client is being added to HIFIS 4, the user is first prompted to enter a record of that Client providing consent. If the user selects the "Declined - Anonymous" consent type, that Client will be visible to the Service Provider that added the Client, but Invisible to other Service Providers.

### 3.3. Hidden Clients

On the Client Vitals screen, a Client can be manually toggled from Visible to Hidden.

A particular user right, *Ability to Hide Clients*, will govern which users can hide Clients and which cannot. A particular user right, *See Hidden Clients*, will govern which users can view Hidden Clients and which cannot. See **Part 4: User Rights** for more information about user rights.

## 4. User Rights

Each HIFIS user has a series of permissions or **user rights** that govern what portions of HIFIS 4 they are able to access.

Often, user rights are organized into **rights templates**, such that a template could be applied to multiple users who would then all have the same user rights.

In general, there are 5 potential user rights that a user might have with regard to a particular area or **HIFIS module**. These are:

- List Records
- Display Record
- Add Record
- Edit Record
- Delete Record

The pre-requisite permission is List Records (for example, “List Clients” or “List Turnaways”), which grants a user access to that HIFIS module. A List page simply lists the records in that HIFIS module. It also provides a limited amount of information about that record.

To access the complete record, a user must be given Display Record permissions. The ability to Display a Record grants access to all fields within that record.

---

### **EXAMPLE:**

*If a user has permission to List Clients, they can view the Client List, which shows the names of all the (visible) Clients in the Cluster. Clicking on a Client's name would open up the client file, which can be done by users with permission to Display Clients.*

---

An unlimited number of user rights templates can be configured and defined locally. They are completely customizable. The ability to create and define user rights templates is itself a user right that can be granted.

Each user is granted a set of user rights at a particular Service Provider. **A user could have access to multiple Service Providers and have different rights at each Service Provider.**

---

### **EXAMPLE:**

*A single staff might work part time at Service Provider A and part time at Service Provider B. They would have one user account with access to both Service Provider A and Service Provider B. The staff might have the same user rights at both Service*



*Providers, or they might have different rights at Service Provider A than at Service Provider B.*

---

It is best to understand this concept as follows: when a user logs in to HIFIS 4, they must choose which Service Provider to access, or log in at, at that particular time. Many users will only have one Service Provider that they have permission to access. After the user makes their choice and logs in, they are now accessing HIFIS from the point of view of that Service Provider, with the user rights they have been assigned at that Service Provider.

---

***EXAMPLE:***

*If a user logs in to Service Provider A and they have permission to List Clients, they can navigate to the Client List. There, they will see a list of all the Clients that are in Service Provider A's Cluster, that are visible to Service Provider A, and that are visible to that user.*

---

## 5. Client Vitals

If a HIFIS user is going to have any access to Clients at all, the prerequisite user right is List Clients (see **User Rights**), which grants access to the Client List page.

The Client List page shows a list of all Clients within the current Cluster (the Cluster to which the Service Provider that the user is currently accessing belongs, see **Clusters**), that are visible to the current user (see **Client Visibility**). Note that Clients in HIFIS 4 do not “belong” to one Service Provider or another. Clients belong to a Cluster, and all Service Providers within the Cluster share ownership of those Clients.

If a HIFIS user also has permission to Display Clients, they will have access to the Client Vitals screen. The Client Vitals screen contains the bare minimum information necessary to enter a Client into HIFIS 4. If a field on the Client Vitals screen is mandatory, it must contain a value. A Client file cannot be created if it is missing a value in a mandatory field on the Client Vitals screen.

The following is a list of the fields that are visible to HIFIS users with List Clients permissions, and which additional fields are visible to those with Display Client permissions.

List	Display
First Name *	Alias 2 † ‡
Last Name *	<b>Date of Birth Known YN *</b>
Middle Name † ‡	Information Verified YN *
Alias 1 † ‡	Disability YN *
Date of Birth *	MedicAlert YN
Age *	Client is Visible/Hidden *
Gender *	Veteran Status *
File Number † ‡	Citizenship/Immigration Status *
Client State *	Aboriginal Status *
	<b>Geographic Region † ‡</b>
	Country of Birth *
	Province of Birth
	City of Birth
	Cause of Death
	Date of Death Approximate YN *
	Date of Death

There is a HIFIS setting called *Restrict Client Search* that restricts access to the Client List, even for users that have permission to access it. Instead of accessing the Client List directly, users must first type in text to search for the name of their Client, instead of browsing the list. This setting is defined at the Cluster level and is true for all Service Providers and users within the Cluster.

There is a HIFIS setting called *Enable Attestation* that restricts access to the Client Vitals screen, even for users that have permission to access it. Instead of accessing the Client Vitals screen directly, users are first prompted to attest that they have permission to access that Client’s file. This attestation is logged and can be audited. This setting is defined at the Cluster level and is true for all Service Providers and users within the Cluster.

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

## 6. Client Consent

Clients must consent to allow their information to be entered into a shared database like HIFIS 4.

HIFIS has a special module that allows users to create a record of the Client providing consent to share their information.

There is a Cluster setting called *Enforce Consent*. With this setting turned on, users are prompted to record a Consent record for the Client at the time of Client creation. With this setting turned on, it is mandatory for users to create a Consent record for each Client. This setting is defined at the Cluster level and is true for all Service Providers and users within the Cluster.

With *Enforce Consent* turned on, users can access the Client file, using their List Records and Display Record permissions. However, when trying to modify records attached to the Client (Add, Edit or Delete), the user will be prompted to add a new Consent record and will be unable to complete their task if they do not do so.

There is a HIFIS setting that allows for Consent expiry. This setting allows the administrator to specify a number of days. By default, when a Consent record is filled, the End Date will be pre-populated to contain the date that is the specified number of days after the Start Date for the Consent record. This setting is defined at the Cluster level and is true for all Service Providers and users within the Cluster.

Each Consent record is tied to the Service Provider which first created the record. Consent records cannot be edited by users outside of that Service Provider.

List	Display
Service Provider *	Comments † ‡
Consent Type *	
Start Date *	
End Date	
Attachments	

Note that the current Consent Type (current, in this case meaning having a Start Date before today, and a blank End Date or an End Date after today) is shown on the Client Vitals screen.

Note that, if *Enforce Consent* is turned on, the current status (Active or Inactive) of the Consent record is shown on the Client Vitals screen.

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

## 7. Client Information

Client Information has to do with the Client, outside of the Client's interactions with Service Providers. **In general, Client Information does not “belong” to a Service Provider, and is shared with and editable by other Service Providers.** In most cases, HIFIS 4 does not associate these data points with any Service Provider.

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**EXAMPLE:**

*A client's eye colour is not a data point that is any way associated with a Service Provider. This data point is true for the client, regardless of which Service Provider they are interacting with.*

---

Not all HIFIS users have access to all these data points. However, if a user has access to one of these data points, they have access to that data point for all Clients (that are in their Cluster, and that are visible to them). If a user does not have access to one of these data points, they do not have access for any Client.

---

**EXAMPLE:**

*A user may require access to information regarding Clients' Education because they work at a family shelter and need to know what schools their Clients are attending and need to make bussing arrangements. This user will also have access to the Education records for all Clients, even though they don't need access to Education records for the parents, youth at other shelters, or single adults.*

*A different user may not require access to the Education records for Clients because they work mainly with seniors. This user's Rights could be restricted to prevent access to education records for all Clients, since it's not relevant for their job.*

---

The following tables contain user-entered data regarding clients, excluding service interactions. Each table illustrates which fields that are visible to HIFIS users with List Records permissions, and which additional fields are visible to those with Display Record permissions.

Note that some fields are identified as being mandatory, and some that can be set as mandatory. None of these fields are truly mandatory because of the following reason: in order to add a Client, only the fields on the Client Vitals screen are truly required. Each of the pieces of additional Client Information are stored on separate screens. Once the Client has been added, there is nothing that requires the user to go to the next screen and add additional data. Thus, if a user goes to an additional screen and adds a record on that screen, certain fields are mandatory, but if the user does not go to that screen, there will not be any data recorded.

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

**EXAMPLE:**

*If, after a user adds a client, they choose to add an Education record, they must fill out the mandatory Education fields, such as School and Education Level. However, the user could choose not to add any Education records at all for that client.*

## 7.1. Aboriginal Status

List	Display
Aboriginal Status *	
Province/Territory	
Band Name	
Treaty Number	
Home Reserve	

7.2. Behavioural Risk Factors <sup>1</sup>

List	Display
Behavioural Risk Factor *	Comments † ‡
Start Date *	
End Date † ‡	
Severity	

## 7.3. Contact Information

List	Display
Means of Communication *	
Value *	
Extension	

## 7.4. Contacts

List	Display
Contact Name * <sup>2</sup>	
Relationship *	
Phone	
Email Address	

## 7.5. Contributing Factors

List	Display
------	---------

<sup>1</sup> Current Behavioural Risk Factors (current, in this case meaning having a Start Date before today, and a blank End Date or an End Date after today) create a Client Flag

<sup>2</sup> Contact Name is drawn from the People module

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

Contributing Factor *	Comments † ‡
Start Date *	
End Date † ‡	

## 7.6. Dietary Requirements

List	Display
Dietary Requirement Category *	
Food Item *	
Avoided YN *	
Active YN *	

## 7.7. Distinguishing Features

List	Display
Distinguishing Feature *	
Description	

## 7.8. Education

List	Display
School * <sup>3</sup>	Comments † ‡
Start Date *	
End Date † ‡	
Education Level *	
Completed YN *	

## 7.9. Family

List	Display
Family Member Name * <sup>4</sup>	
Family Role *	
Relationship to Family Head *	
Start Date *	
End Date † ‡	

## 7.10. Housing History

List	Display
Housing Type *	Place Name
Start Date *	Address Line 2
End Date † ‡	Postal Code † ‡
Address Line 1	Geographic Region
Unit/Apartment Number	Rent

<sup>3</sup> School is drawn from the Places module

<sup>4</sup> Each Family Member has their own Client file

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

Country *	Telephone 1 † ‡
Province/Territory/State † ‡	Extension
City † ‡	Telephone 2 † ‡
	Mobile Phone † ‡
	Email Address † ‡

## 7.11. Identification

List	Display
Identification Type *	
Identification Number *	
Description † ‡	
Attachment	

## 7.12. Languages

List	Display
Language *	
Service Language YN *	

## 7.13. Life Events

List	Display
Life Event *	Comments † ‡
Start Date *	
End Date † ‡	
	Charge <sup>5</sup>
	Charge Number <sup>6</sup>
	Charge Type <sup>6</sup>
	Offence Date <sup>6</sup>
	Charge Date <sup>6</sup>
	Pardoned YN <sup>6</sup>
	Convicted YN <sup>6</sup>
	Comments <sup>6</sup>
	Risk Level <sup>6</sup>
	Curfew <sup>7</sup>
	Comments <sup>7</sup>
	Probation/Parole Officer * <sup>7 8</sup>
	Comments <sup>9</sup>
	Gang Name <sup>9</sup>

<sup>5</sup> These fields are only used if one of the following Life Event Types is selected: Legal – Bail, Legal – Interaction with the police, Legal – Court appearances, Legal – On Probation, Legal – On Parole, Legal – Other

<sup>6</sup> These fields are only used if one of the following Life Event Types is selected: Legal – Bail

<sup>7</sup> Probation/Parole Officer is drawn from the People module

<sup>8</sup> These fields are only used if one of the following Life Event Types is selected: Legal – On Probation, Legal – On Parole

<sup>9</sup> These fields are only used if one of the following Life Event Types is selected: Gang Affiliation

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

	Direct Involvement YN <sup>10</sup> Comments <sup>10</sup>
--	---

## 7.14. Physical Appearance

List	Display
Height * Weight Hair Colour Eye Colour	

## 7.15. Profile Picture

List	Display
Image *	

## 7.16. Risk of Homelessness

List	Display
At-Risk Status * Date of Change * Caseworker *	

## 7.17. Vehicles

List	Display
Make * Model † ‡ License Plate † ‡ Start Date * End Date † ‡	Year † ‡ Colour † ‡

## 7.18. Veteran Service

List	Display
Veteran Service (Armed Conflict) * Start Date * End Date * Role Injured YN PTSD YN Benefits YN	Element * Rank * Reason for Being Discharged from Service * Role † ‡ Awards YN Reserves YN VAC Caseworker † ‡ Veterans Service Number <sup>10</sup> Comments † ‡

<sup>10</sup> Veterans Service Number is drawn from the Identification module

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled



7.19. Watch Concerns <sup>11</sup>

List	Display
Watch Concern * Start Date * End Date † ‡ Severity † ‡	Comments † ‡

<sup>11</sup> Current Watch Concerns (current, in this case meaning having a Start Date before today, and a blank End Date or an End Date after today) create a Client Flag

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

## 8. Client Documents

Documents can be uploaded to a client file through a variety of methods, and are shared in ways that is slightly different than other types of Client Information. As a result, it is worth clarifying how these differ.

The various parts of the software that allow for users to upload Documents include:

- Documents
- Consent (see **Client Consent** on page 10)
- Identification (see **Identification** on page 14)
- Profile Picture (see **Profile Picture** on page 15)
- Case Management (see **Case Management** on page 23)
- Housing Loss Prevention (see **Housing Loss Prevention** on page 25)
- Housing Placements (see **Housing Placement** on page 26)
- Incidents (see **Incidents** on page 27)

Broadly, there are two types of Documents that can be uploaded: **Confidential** and **non-Confidential** documents. Whether a Document is Confidential or not is decided by the user at the time of upload, but users may not always have a choice in this matter. Individual users may be granted a user right entitled View Confidential Files. All users with the ability to List Documents will be able to see that a Confidential Document exists, but only users with the ability to View Confidential Files may download Confidential Documents. Users may indicate whether a Document is Confidential when they upload it through the following modules:

- Documents
- Housing Loss Prevention
- Housing Placements

The Client Document List contains a list of many, but not all, of the Documents that have been uploaded to the Client's record. This list is accessible to any user with the List Documents right. The Client Document List contains Documents uploaded through the following modules:

- Consent
- Documents
- Identification
- Profile Picture
- Housing Loss Prevention
- Housing Placements

The Client Document List does not contain Documents uploaded through the following modules:

- Case Management
- Incidents

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

## 8.1. Documents

List	Display
Document Type * Attachment * Name † ‡ Description † ‡ Date *	Confidential YN * <sup>12</sup>

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<sup>12</sup> Documents can be set to be Confidential. Confidential Documents can only be accessed by users with the *View Confidential Files* user right.

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

## 9. Shareable Client Information

Some pieces of Client Information behave slightly differently.

There is a Cluster setting called *Enable Sharing*. With this setting turned on, users are granted the ability to control whether certain data points are shared with other Service Providers or not. This setting only applies to certain elements of Client Information, as listed below. This setting is defined at the Cluster level and is true for all Service Providers and users within the Cluster.

If the *Enable Sharing* setting is on, and a user specifies that the specific record is Not Shareable, the record is Invisible to other Service Providers.

**EXAMPLE:**

*In the community, clients' health information is identified as requiring special protection. Only Service Provider A collects health information, and they do not want to share the information they collect with other Service Providers, so whenever a client's health record is entered into HIFIS 4, the user indicates that this health record is not shareable. Users at Service Provider B, even ones with rights to List Health and Display Health, can't even see that Service Provider A has created health records for their clients.*

### 9.1. Comments

List	Display
Subject * Date Created * Author * Service Provider *	Comments *

### 9.2. Financial Assets

List	Display
Asset Type * Amount * Start Date * End Date † ‡	Country * Province/State Description † ‡

### 9.3. Financial Debt

List	Display
Debt Type * Amount * Start Date * End Date † ‡	Country * Province/State Description † ‡

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

## 9.4. Financial Expenses

List	Display
Expense Type *	
Monthly Amount *	
Start Date *	
End Date † ‡	
Essential YN *	

## 9.5. Financial Income

List	Display
Income Type *	Pay Frequency *
Monthly Amount *	Hours/Days Per Month *
Start Date *	
End Date † ‡	
Primary YN *	
	Employment Type <sup>13</sup>
	Employer Type <sup>13</sup>
	Employer Name <sup>13</sup>

## 9.6. Health

List	Display
Health Issue *	Description † ‡
Start Date *	Symptoms † ‡
End Date † ‡	Medication † ‡
Self Reported YN *	Treatment † ‡
Suspected YN *	
Diagnosed YN *	
Contagious YN *	
Service Provider *	

## 9.7. Medication

List	Display
Medication Name *	Pharmacy <sup>15</sup>
Current Pill Count	Prescriber <sup>16</sup>
Health Issue † ‡ <sup>14</sup>	Maximum Number of Doses per Day † ‡
Recurrence *	Initial Pill Count
Dosage *	Fulfillment Date † ‡

<sup>13</sup> These fields are only used if one of the following Income Types is selected: Employment – Casual, Employment – Full-Time, Employment – Part-Time

<sup>14</sup> Health Issue is drawn from the Health module

<sup>15</sup> Pharmacy is drawn from the Places module

<sup>16</sup> Prescriber is drawn from the People module

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

Start Date *	Refill Date † ‡
End Date † ‡	Comments † ‡
Service Provider *	

- \* Denotes a mandatory field
- † Denotes a field that can be made mandatory
- ‡ Denotes a field that can be disabled

## 10. Client Services

The following tables contain user-entered data regarding the service interactions of clients. **In general, some limited information is shared with other Service Providers, and it is not editable by other Service Providers.**

Users that have rights to Add a service-related Record can do so. When they do, the Record is attached to the Service Provider. In other words, that Service Provider provided the service.

Users that have rights to Display, Edit, or Delete a service-related Record can do so if they have permission to do so at the Service Provider that provided the service.

The greatest rights that can be granted to a User that **does not have access to** that Service Provider is List Records (see **User Rights** for more information about “having access to” Service Providers).

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### EXAMPLE:

*A turnaway is recorded at Service Provider A. Staff at Service Provider A have user rights to list, display, add, and edit turnaways. These staff have the ability to list, display, and edit turnaways that occurred at Service Provider A.*

*Service Provider B also records turnaways. Staff at Service Provider B have the same user rights as those at Service Provider A, including the rights to list, display, and edit turnaways. They can list, display, and edit turnaways that occurred at Service Provider B. However, when they try to view turnaways that occurred at Service Provider A, they are unable to display or edit them, because the turnaway occurred at a different service provider. Even though these staff have user rights that allow them to display and edit turnaways, they can only do so with turnaways that occur at their service provider.*

---

A user may have access to multiple Service Providers. This most frequently occurs when a staff works part time at multiple agencies, however, depending on the configuration, it may be done to facilitate greater data sharing (see also **User Rights**).

### 10.1. Admissions

List	Display
Client Name *	Expected Book Out Date † ‡
Service Provider *	Program † ‡
Start Date and Time *	Referred from † ‡
End Date and Time *	Referred by † ‡
Reason for Service *	Referred to
Room *	Reason for Discharge*
Bed *	Late Pass Time
	Wake Up Time
	Intoxicated YN*

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

	Comments † ‡
--	--------------

## 10.2. Appointments

List	Display
Client Name * Service Provider * Appointment Type * Location * Description † ‡ Start Date and Time * End Date and Time † ‡ With † ‡ Followed Through *	Comments † ‡

## 10.3. Calls and Visits Log

List	Display
Client Name * Service Provider * Log Type * Subject * Nature of Contact * Date and Time * Name *	Type * Ex-Resident YN * Duration Hours † ‡ Duration Minutes † ‡ Geographic Region † ‡ Comments † ‡

## 10.4. Case Management

List	Display
Client Name * Service Provider * Caseworker * Goal * Status * Target Date † ‡	Program † ‡ Contributing Factors † ‡
	Session Activity * <sup>17</sup> Session Description † ‡ <sup>17</sup> Session Date & Time * <sup>17</sup> Session Expended Hours † ‡ <sup>17</sup> Session Expended Minutes † ‡ <sup>17</sup> Session Caseworker * <sup>17</sup> Session Responsibility † ‡ <sup>17</sup> Session Agency Involved / Referral † ‡ <sup>17</sup> Client Present at Session YN * <sup>17</sup> Family Present at Session YN * <sup>17</sup>

<sup>17</sup> These fields are only used if a Case Session is added to an existing Case

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled



	Case Documents <sup>18</sup>
	Case Comment Subject * <sup>19</sup> Case Comment Comments * <sup>19</sup>

## 10.5. Chores

List	Display
Client Name * Service Provider * Chore Type * Start Date * End Date † ‡ Expended Hours † ‡ Expended Minutes † ‡	Stay Information * Description † ‡

## 10.6. Conflicts

List	Display
Client Name * Service Provider * Counterpart Name * Start Date * Conflict Type *	Client Victim/Aggressor Status * Counterpart Victim/Aggressor Status * Intensity * End Date † ‡ Probability † ‡ Relationship † ‡ Location Type † ‡ Referred from † ‡ Referred to † ‡ Comments † ‡

## 10.7. Food Banks

List	Display
Client Name * Service Provider * Start Date and Time * Number of Individuals † ‡	Reason for Service * Program † ‡ Referred by † ‡ Referred from † ‡ Referred to † ‡ Case Management Activity † ‡

## 10.8. Goods and Services

List	Display
Client Name * Service Provider * Start Date and Time *	Reason for Service * Program † ‡ Referred by † ‡

<sup>18</sup> These fields are only used if a Case Document is added to an existing Case

<sup>19</sup> These fields are only used if a Case Comment is added to an existing Case

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

	Referred from † ‡ Referred to † ‡ Case Management Activity † ‡ Number of Individuals † ‡ Comments
Good Type *	Unit of Measure * 20 Quantity † ‡ 20 Unit Cost † ‡ 20 Unit Price † ‡ 20
Service Type *	Start Date and Time * 21 End Date and Time † ‡ 21 Expended Hours † ‡ 21 Expended Minutes † ‡ 21 Service Cost † ‡ 21 Service Price † ‡ 21

### 10.9. Group Activities

List	Display
Service Provider * Activity Name * Location † ‡ Start Date and Time * Number of Attendees Attendee Name	Program † ‡ Expended Hours † ‡ Expended Minutes † ‡ Description † ‡ Reason for Service * Referred from † ‡ Referred to † ‡ Number of Anonymous Attendees Demographics of Attendees Staff Name External Contact Name Comments

### 10.10. Housing Loss Prevention

List	Display
Client Name * Service Provider * Reason for Service * Start Date * Caseworker * Next Scheduled Follow-up † ‡ Target Date † ‡	Program † ‡

<sup>20</sup> These fields are only used if a Good is added to an existing Goods & Services Transaction, or if an Express Good is added

<sup>21</sup> These fields are only used if a Service is added to an existing Goods & Services Transaction, or if an Express Service is added

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

Housing Loss Prevention Document * <sup>22</sup> Document Name <sup>22</sup> Confidential YN * <sup>22 23</sup> Description <sup>22</sup>	
Subsidy Program * <sup>24</sup> Subsidy Start Date * <sup>24</sup> Reason for Service * <sup>24</sup> Subsidy End Date <sup>24</sup> Subsidy Amount * <sup>24</sup> Payment Date <sup>24</sup> Pay Frequency <sup>24</sup> Comment <sup>24</sup>	
Next Follow Up Date <sup>25</sup>	Follow Up Date * <sup>25</sup> Follow Up Months Elapsed <sup>25</sup> Final Follow Up YN * <sup>25</sup> All Clients Still in Housing * <sup>25</sup> Clients that have Left Housing * <sup>25</sup> Reasons Left Housing * <sup>25</sup> Is Housed Elsewhere * <sup>25</sup> Unit Now Available * <sup>25</sup> Comments <sup>25</sup>

## 10.11. Housing Placement

List	Display
Client Name * Service Provider * Search Started Date * Housing Type(s) Sought * Caseworker * Status Target Date † ‡	Program † ‡
	Attempt Date * <sup>26</sup> Reason Housing Not Secured * <sup>26</sup> Caseworker * <sup>26</sup> Final Attempt YN * <sup>26</sup> Comments <sup>26</sup>
Housing Placement Document * <sup>27</sup> Document Name <sup>27</sup>	

<sup>22</sup> These fields are only used if a Housing Loss Prevention Document is added to an existing Housing Loss Prevention Record

<sup>23</sup> Documents can be set to be Confidential. Confidential Documents can only be accessed by users with the *View Confidential Files* user right (see **Client Documents**)

<sup>24</sup> These fields are only used if a Housing Subsidy is added to an existing Housing Loss Prevention. This information is also accessed through the Housing History table (see **Housing History**)

<sup>25</sup> These fields are only used if a Housing Loss Prevention Follow-Up is added to an existing Housing Loss Prevention Record

<sup>26</sup> These fields are only used if a Housing Placement Attempt is added to an existing Housing Placement

<sup>27</sup> These fields are only used if a Housing Placement Document is added to an existing Housing Placement

\* Denotes a mandatory field

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‡ Denotes a field that can be disabled

Confidential YN * 27 28 Description 27	
Housing Unit * 29 30 Expected Move In Date	
Subsidy Program * 31 Subsidy Start Date * 31 Reason for Service * 31 Subsidy End Date 31 Subsidy Amount * 31 Payment Date 31 Pay Frequency 31 Comment 31	
Next Follow Up Date 32	Follow Up Date * 32 Follow Up Months Elapsed 32 Final Follow Up YN * 32 All Clients Still in Housing * 32 Clients that have Left Housing * 32 Reasons Left Housing * 32 Is Housed Elsewhere * 32 Unit Now Available * 32 Comments 32

### 10.12. Incidents

List	Display
Service Provider *	Emergency Services † ‡
Involved *	Charges Laid 33
Witnesses	Police Badge 33
Nature of Incident *	Police Report Number 33
Date and Time † ‡	Disposition † ‡
Location *	Comments † ‡
Attachments † ‡	

### 10.13. Medication Dispensing

List	Display
	Service Provider *
	Client *
	Medication * 34

28 Documents can be set to be Confidential. Confidential Documents can only be accessed by users with the *View Confidential Files* user right (see **Client Documents**)

29 These fields are only used if a Housing Unit is secured and moved into via an existing Housing Placement

30 A Client’s Housing Unit, after move-in, is listed in the Housing History table (see **Housing History**)

31 These fields are only used if a Housing Subsidy is added to an existing Housing Placement. This information is also accessed through the Housing History table (see **Housing History**)

32 These fields are only used if a Housing Placement Follow-Up is added to an existing Housing Placement

33 These fields are only used if the Emergency Services field includes Police

34 Medication Type is pulled from the Medication module (see **Medication**)

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

	Dispensing Date * Dispensed By * Morning * Noon * Evening * Bedtime * PRN *
--	---

#### 10.14. Reservations

List	Display
Client Name * Service Provider * Start Date and Time * End Date and Time * Reason for Service * Room * Bed *	Expected Book Out Date † ‡ Referred from † ‡ Referred by † ‡ Reservation Status * Comments † ‡

#### 10.15. Service Restrictions

List	Display
Service Provider(s) * Client * Start Date and Time * End Date and Time * Modules * Reason for Restriction *	Requested by * Comments *

#### 10.16. Service Prioritization Decision Assistance Tool (SPDAT)

List	Display
Service Provider * Client * Start Date and Time * Caseworker * Type * Version * Score	Assessment Period * Consent YN * Program † ‡ Description † ‡ Questions Answers Comments

#### 10.17. Storage

List	Display
Service Provider(s) * Client * Item *	Comments † ‡

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

Stored Location † ‡ Start Date * End Date † ‡	
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## 10.18. Surveys

List	Display
Service Provider * Client * Survey Name * Date Taken *	Questions Answers

## 10.19. Turn Aways

List	Display
Service Provider * Client * Family Members Effective Date and Time † ‡ Reason for Turn Away *	Presumed Aboriginal * <sup>35</sup> Observed Disability * <sup>35</sup> Age Group * <sup>35</sup> Gender * <sup>35</sup> Number of Adults * Number of Children * Requested by * Referred by † ‡ Referred from † ‡ Referred to † ‡ Comments † ‡

## 10.20. Vulnerability Assessment Tool (VAT)

List	Display
Service Provider * Client * Start Date and Time * Caseworker * Score	Consent YN * Program † ‡ Description † ‡ Questions Answers Comments

## 10.21. Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT)

List	Display
Service Provider * Client * Start Date and Time * Caseworker *	Pre-Screen Period * Consent YN * Program † ‡ Description † ‡

<sup>35</sup> These fields are only used if the Turnaway is Anonymous

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled

Type *	Questions
Version *	Answers
Score	

## 10.22. Waiting Lists

List	Display
Client *	End Date † ‡
Waiting List Name *	Priority *
Waiting List Type *	Reason for Being on List *
Start Date *	Status History *
Days on List *	Comments † ‡
Current Status *	
Status Date *	

\* Denotes a mandatory field

† Denotes a field that can be made mandatory

‡ Denotes a field that can be disabled