HIFIS

Homeless Individuals and Families Information System

Configuration Guide

Version 2.0

Infrastructure Canada

Canada

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For more information, contact:

Infrastructure Canada
180 Kent Street, Suite 1100
Ottawa, Ontario K1P 0B6
info@infc.gc.ca

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Change Log

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Contents

Glossary

Term	Definition
Admissions	The process of admitting an individual or family that is homeless or at-risk of homelessness into a service provider.
At-risk of Homelessness	At-risk of homelessness refers to a housing situation that is precarious. For example, the housing may not meet public health and safety standards or the tenant may have received an eviction notice from the landlord. Imminent risk of homelessness refers to a housing situation that will end in the near future (for example, within two weeks) where the household does not have the immediate prospect, means or ability of acquiring a subsequent residence.
Bed Selection	A graphical display of a shelter's rooms and beds.
Bulletin	A message that can be read by users who are logged in to HIFIS.
Case Management	A comprehensive and strategic form of service provision, either short- or long-term, whereby a case worker assesses the needs of individuals and families and, as appropriate, arranges, coordinates and advocates for a range of programs and services designed to meet their needs and preferences. Workers can specialize in various forms of case management, such as service navigation (e.g., helping people to apply for various benefits, get on wait lists and get ready for an offer through Coordinated Access) or housing support (sometimes referred to as housing-based case management).
Chronic Homelessness	Refers to persistent or long-term homelessness where people experience: • Homelessness for at least 180 days at some point over the course

	of a year (not necessarily consecutive days); and/or, • Recurrent episodes of homelessness over three years that total at least 18 months.
Client	A person who has accessed or is currently accessing services in a system of care.
Client Consent Form	An agreement between the client and the organizations that use HIFIS that grant the authorization to collect, retain, and share the client’s data for purposes outlined in the client consent form.
Client State	A way of identifying clients in HIFIS by their current level of engagement with the homeless-serving system. At any point in time, clients are either active, inactive, archived or deceased.
Active Client State	Refers to clients that have service interactions (documented in HIFIS) within the timeframe set by the HIFIS Inactivity Threshold.
Archived Client State	Refers to clients that have been inactive for an extended length of time, as defined by the community’s data retention policy. In HIFIS, archived clients are not included in the Unique Identifier List. They are visible in the Archived search function on the Client List and their data would be included in all applicable historical reports (e.g., shelter occupancy reports).
Deceased Client State	Refers to clients that have died. In HIFIS, deceased clients are not included in the Unique Identifier List. They are visible in the Deceased search function on the Client List and their data would be included in all applicable historical reports (e.g., shelter occupancy reports).
Inactive Client State	Refers to clients that have service interactions (documented in HIFIS) outside the timeframe set by the HIFIS Inactivity Threshold.
Cluster	A functionality that allows client data from specific HIFIS Service Providers to be isolated. HIFIS Service Providers can

	only view data within their designated cluster.
Community Advisory Board (CAB)	Community Entities are supported by advisory boards responsible for recommending projects for funding. Advisory boards generally include a wide range of stakeholders (e.g., representing the municipality, provincial, or territorial governments as well as not-for-profit organizations and for-profit enterprises). CABs under the Designated Communities and Territorial Homelessness streams are responsible approving the Community Plan and the Community Homelessness Report developed by the Community Entity.
Community Data Sharing Agreement (CDSA)	An agreement between the organizations that use HIFIS and the HIFIS Lead that governs data sharing within a community. Typically, these agreements outline: • What information will be shared and why; • Expectations related to data entry and data quality; • Privacy and security, and, • Data management practices.
Contributing Factors	Life events that have played a role in leading the client to requiring assistance from a service provider.
Coordinated Access	A way for communities to bring consistency to the process by which people experiencing or at-risk of homelessness access housing and related services within a geographic area. Coordinated Access streamlines how people get connected to housing and related services at the community level, creating greater efficiencies and shortening the path from homelessness to housing. As an integrated, systems-based approach to service delivery, Coordinated Access helps local organizations and service providers work together to achieve common goals.

	Strong systems include a Housing First approach, streamlined service delivery across different types of service providers, and real-time data. A standardized workflow for Coordinated Access includes access points to service, a shared triage and assessment process, and a shared vacancy matching and referral process with prioritization.
Custom Tables	HIFIS module that can generate customized records for HIFIS Service Providers whose needs exceed the defaults of the application.
Data Provision Agreement (DPA)	An agreement between the Government of Canada and the HMIS/HIFIS Lead that outlines roles and responsibilities, as well as the collection of certain non-directly identifiable export fields.
Family Head	Where individuals are part of a family, the Family Head is the person who has been identified as the lead for the family as a whole (e.g., the primary parent or guardian responsible for dependents).
HIFIS Administrator	A role responsible for administrative functions within HIFIS (e.g., configuration, data integrity, backups, and release management).
Homeless Individuals and Families Information System (HIFIS)	Developed by the Government of Canada, HIFIS is a Homelessness Management Information System (HMIS) designed to support the day-to-day operational activities of Canadian service providers in the homeless-serving sector. As a comprehensive data collection and case management system, HIFIS enables participating service providers within the same community to access, collect, and share local real-time homelessness data and ensure that individuals and families are prioritized and referred to appropriate services at the correct time.
HIFIS Host	The organization that manages the server(s) on which HIFIS is installed and where client information is stored.

HIFIS Lead	The organization or dedicated staff role that is responsible for the ongoing maintenance of HIFIS.
HIFIS Program	A “label” or “tag” applied to client transactions in the database, so they can be grouped by a specific category for the purpose of reporting.
HIFIS Service Provider	Configuration of an organized and logical “set of services” available to people in a homeless-serving system. Transactions in HIFIS are based on the HIFIS Service Provider in which users are logged into. Client information is shared within and between HIFIS Service Providers based on user rights. User rights are granted to HIFIS users based on the role they play in their organization (i.e., HIFIS Service Provider) and the role that this organization plays in the Coordinated Access system.
Homelessness Management Information System (HMIS)	Software that collects client-level data and manages service provider information over time within a homeless-serving system.
Housing Continuum	Refers to the full range of housing options available in a community, from shelter to temporary and permanent housing options.
Housing First	Providing people experiencing homelessness with immediate access to permanent housing and appropriate levels of support to stay housed, particularly for those with deeper levels of need or longer periods of housing instability. Housing First interventions consider stable, affordable housing as a prerequisite to overall health and well-being.
Housing Status	Classifies people by their Housing Type. At any point in time, clients can have a Housing Status of Homeless, Housed, Public Institution, Transitional, or Unknown.

Homeless	This Housing Status indicates that a client has an active shelter stay or an active Housing History record with a Housing Type that is categorized as Homeless.
Housed	This Housing Status indicates that a client has a Housing History record with a Housing Type that is categorized as Housed.
Public Institution	This Housing Status indicates that a client has a Housing History record with a Housing Type that is categorized as Public Institution. This Housing Status can be configured to roll up to either Homeless or Housed. Days spent with this Housing Status do not count toward the federal calculation of chronic homelessness.
Transitional	This Housing Status indicates that a client has a Housing History record with a Housing Type that is categorized as Transitional. This Housing Status can be configured to roll up to either Homeless or Housed. Days spent with this Housing Status do not count toward the federal calculation of chronic homelessness.
Unknown	A Housing Status of Unknown indicates that the client does not have an active Housing History record or shelter stay.
Homeless-serving system	All of the service providers within a geographic boundary that help people with their housing challenges. These providers are part of the same service delivery network. With a Coordinated Access workflow in place, the system shifts from an informal network of providers to a more structured service delivery approach.
Life Events	Life Events are defined as discrete experiences that disrupt an individual's usual activities causing a substantial change and readjustment.
Local HIFIS Help Desk	A service for HIFIS users established by a community that helps resolve technical issues, leads service requests, manages incidents, supports new releases, and addresses issues with data quality.

Look-up Tables	A functionality that allows HIFIS users to add, edit or remove values that appear in drop-down menus.
Modules	Key components of HIFIS organized by functions or similar types of service transactions (e.g., Case Management, Housing Placement, Directory of Services, or Food Bank).
Person(s) with Lived Experience or expertise	People that have direct experience with homelessness, either currently or in the past.
Privacy Impact Assessment	The process used to determine how business processes and software configuration could affect the privacy of a client. The purpose of conducting a Privacy Impact Assessment is to ensure that privacy issues are identified and mitigated or resolved. Typically, assessments are completed during the planning phase of implementation, before deployment.
Rights Templates	Functionality that allows a HIFIS Administrator to apply the same user rights to multiple HIFIS users that need access to the same modules/data fields to do their jobs.
Service Provider	An entity with staff that directly interact with clients. There are different kinds of service providers, each with different resources (or programming) to offer. Service providers in a homeless-serving system include street outreach, shelters, housing support and supportive housing, for example.
Service Prioritization Decision Assistance Tool (SPDAT)	A suite of assessment tools developed by OrgCode Consulting. The triage tool is called the VI-SPDAT. Triage results can be confirmed or updated through a full SPDAT assessment. These tools are integrated in HIFIS.
HIFIS Super User	A specialized HIFIS user role that supports the HIFIS Administrator.
Transitional Housing	Temporary, time-limited housing with support (case management) that is appropriate for the target population

	group (e.g., youth or newcomers) and more intensive than emergency shelter. For example, programming could focus on developing the necessary skills to be able to live more independently. Stays are also typically longer than shelter, with guidelines that range from three months to three years.
Unique Identifier List	A list of every person in a community that is currently experiencing homelessness. A Unique Identifier List is generated from a person-specific dataset for homelessness. Each person is included only once, after they have given consent for their information to be collected and shared with others. People are not included if they are housed, if they have not been in contact with the homeless-serving system for some time (often 90 days) or if they pass away.
User Rights	A HIFIS feature that supports the safeguarding of client information by ensuring HIFIS users can only access the modules and client information necessary to do their job. Rights specify if a user can see, edit, list and/or delete data in the modules/data fields they can access. Rights are granted based on a number of factors, including the role they play in their organization and the role that organization plays in the Coordinated Access workflow.
Domestic Violence Shelter	Temporary accommodation or housing with support for individuals and/or families fleeing domestic abuse or the threat of violence.
Vulnerability Assessment Tool (VAT)	An assessment tool developed by the Downtown Emergency Service Centre in Seattle. The tool is integrated in HIFIS.

The HIFIS Toolkit

Over the last two decades, the ways to measure the extent of homelessness have significantly evolved in Canada. The dedication of service providers and municipal and provincial governments to collect and share data through the Homeless Individuals and Families Information System (HIFIS) and Point-in-Time counts is at the centre of this success. When used jointly, these data collection efforts provide a comprehensive local and national picture of homelessness. For the first time in history, Canadians have quality data that supports policy and program development, as well as strategic planning in the homelessness sector.

As Canada is moving forward with the National Housing Strategy and Reaching Home: Canada's Homelessness Strategy, collecting, managing and sharing data becomes more important than ever to advance the collective understanding of homelessness and to support decision-making. In particular, Reaching Home emphasizes coordinated access and introduces a data-driven, client-centered approach to serve individuals and families experiencing or at risk of homelessness.

In this context, the Government of Canada is committed to continuously enhance HIFIS in order to support communities in their data collection and efforts to eliminate homelessness. Recognizing that HIFIS modernization is driven by the homelessness sector's needs, a National HIFIS working group was created in 2018 to leverage the expertise of communities and experts and help guide HIFIS enhancements.

HIFIS is designed to support coordinated access by allowing multiple service providers from the same community to access real-time homelessness data through a community-wide system available via web-enabled devices, such as laptops, smartphones and tablets. HIFIS also allows communities to document the number, characteristics, and needs of homeless individuals and families, as well as the number of people receiving services.

To meet Reaching Home requirements and implement coordinated access systems, communities have to adapt their business model, which encompasses developing and adopting new governance frameworks and data management strategies. Doing so requires planning, committing resources and training to promote data literacy and instill a data-driven culture.

To assist communities in this transformation, INFC has developed a HIFIS Toolkit composed of four guides. These guides cover the following topics:

1. **Implementation** – Provides guidance from planning to the deployment and maintenance of HIFIS.
2. **Installation** – Describes the technical requirements, architecture and installation procedures.

3. **Configuration** – Explains the configuration procedures to align with a community's business needs.
4. **User** – Gives a description of each function and how to use it.

Communities using HIFIS become part of a pan-Canadian movement that is building a data-driven culture to advance the understanding of homelessness in Canada. By working together, we can support the most vulnerable Canadians in providing access to safe, stable and affordable housing and reduce chronic homelessness nationally by 50% by 2027–2028.

About the HIFIS Configuration Guide

The Configuration Guide is for the business analyst or project manager who needs step-by-step instructions to set up and configure HIFIS to support the community business model and coordinated access system. Proper configuration will help communities access information that supports their daily operations and helps measure progress on preventing and reducing homelessness. The Configuration Guide covers the configuration of programs, rights templates, look-up tables, reports and others.

The guide should be used with the Implementation Guide, which gives an overview of the steps required to implement HIFIS, including those required before configuring, and explains the considerations for the configuration of HIFIS. For details on how to install HIFIS on a server and technology required to support the system, refer to the HIFIS Installation Guide.

For more information to support the implementation and management of HIFIS, you can visit the Homelessness Learning Hub.

To stay connected and get the latest updates on HIFIS, please confirm your interest by sending your consent at support@hifis.ca.

For any questions or inquiries, you can contact the HIFIS Client Support Centre at **1-866-324-2375** or support@hifis.ca.

Initial Set-up Tasks

Registration

Prior to using HIFIS, you will need to register your installation. This will remove the red 'Unregistered Instance' banner that appears at the top of every page.

The steps to register are:

1. Click on the red banner, or Registration from the Administration menu. Click Begin Registration and enter the required information. The registration will be approved by INFC.
2. Sign and Upload the Data Provision Agreement (DPA). This DPA will be counter-signed by INFC.
3. Download the counter-signed DPA.
4. Receive your community Site Identifier.
5. Activate HIFIS.

Following activation, the red banner will be removed.

Change the Name of the Default Service Provider

When HIFIS is installed, there is one default service provider called 'Set up new Organization.' If you intend to set-up service providers using a hierarchy, this service provider will be at the top of the hierarchy and will likely be the organization that is responsible for the overall management of the system.

One of the first configuration tasks to perform is to change the name of this Service Provider.

Note: If the Service Provider's name is not changed, it will be changed automatically to the name on the Registration when the Registration process is complete.

Steps to follow:

1. From the Administration menu, select Service Provider. This will bring you to the Service Provider Details page.
2. On the Service Provider Details page, click the Edit button.
3. Update the service provider's name.
4. Click the Save button.

Note: The remainder of the fields will be changed when you set-up your service providers.

HIFIS Settings

Determine Application Settings

The Application Settings module allows the system administrator to specify settings that govern how various functionalities in the system will work. The Application Settings module consists of three tabs: Settings, Clusters, and Instances.

The table below describes what each application setting does. These settings are determined by the organization responsible for administering the system.

Application Setting	Description
Bing Maps Key	When searching for a Housing Unit, Bing Maps can be used to show units on a map. A Bing Maps key is required for this. To learn more and create your Bing Maps key, visit www.bingmapsportal.com.
Clients In People Search	This setting allows you to indicate if you also want Client records to be searched in addition to People records. In several locations in the application, you can associate a person (people record) with a record (or a transaction). By entering the person's name in the appropriate field, the system performs a search for that person.
Two-Factor Authentication	Enables a two-tier login system where a code or security key must be entered in addition to your password to log into the system. HIFIS natively supports Twilio SMS message, however, there is an additional cost to use Twilio services.
OrgCode Key	A placeholder setting for the unique code from OrgCode to unlock SPDAT assessments for registered HIFIS instances
Enable GeoRegion Filter	A list of places can be filtered by the geographic region and city in which they are. The Enable GeoRegion Filter allows this feature to be turned on or off. **Note**: If turned on, a Geographic Region Mapping tab will appear.

Minimum Character Input for Search	The minimum number of characters that must be entered in the search fields for a search to be performed
Password Age Limit (days)	The number of days for which a user's password is valid
Password Complexity Help Message	The text that will appear on the screen when the user is entering a new password
Use default File Numbers	A File Number is part of a Client record. If default file numbers are used, every time a new client record is created, a file number will be assigned to the client. The file number will be incremented by 1 (one) for each client. If default file numbers are not used, the File Numbers field will be left blank if nothing is entered by a user.
E-Mail link expiry (Days)	When a user's password is reset by a system administrator, they are sent an email that contains a link to follow to enter a new password. The E-Mail link expiry (Days) field controls how long the link sent to the user will be valid.
Presumed Indigenous Indicator Enabled	When enabled, this setting adds a "Presumed Indigenous" field in the Anonymous Turn Away form.
Observed Disability Indicator Enabled	When enabled, this setting adds an "Observed Disability" field in the Anonymous Turn Away form.

Enter Application Settings

Steps to follow:

1. From the Administration menu, select Application Settings.
2. If Bing Maps is used with the Housing Placement - Housing Search, enter your Bing Maps key.
3. Indicate whether Clients should appear in People Search.
4. Indicate whether two-factor authentication is used.
5. If applicable, enter the OrgCode Key.
6. Indicate whether Geographic Region filtering is used.
7. Enter the number of characters required to perform a client search.
8. Enter the number of days before a user password expires.
9. Enter the text that will appear when a user enters a new password.
10. Indicate whether default file numbers are used.
11. Enter the number of days before a password reset link expires.
12. If applicable, indicate whether the Presumed Indigenous Indicator is enabled.
13. If applicable, indicate whether the Observed Disability Indicator is enabled.
14. Click the Save button.

Geographic Region Mapping

Geographic Region Mapping filters a list of places by geographic region and city. In HIFIS, a place is always associated with a city, and a city can be associated with a geographic region. This feature allows a user to look at all of the places in a given region, or filter this list by a specific city in that region and see only the places in that city.

This filtering is activated by enabling the Geo Region filter in the Application Settings module. Prior to doing Geographic Region Mapping, it is necessary to determine what geographic regions will be used in the Geo Region Look-up Table (instructions on adding Look-up Table Values can be found in the Determine Look-up Table Values section).

Screens where values can be filtered by Geographic Region include:

- Housing Units when doing a Housing Placement or looking at units in the Housing Units module
- Places in the Directory of Services
- Admissions - Bed Availability
- Coordinated Access – Unique Identifier List

Enter Geographic Region Mapping

Steps to follow:

1. From the Administration menu, select Application Settings.
2. On the Application Settings screen, select the Geographic Region Mapping tab.

Note: The Geographic Region Mapping tab will only appear when you are logged in to a site that is in a cluster where the Enable GeoRegion Filter is set to Yes on the Application Settings > Settings screen.

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3. Click the Edit button beside the Geographic Region to which you want to add cities.
4. Add the Cities that are in the Geographic Region.
5. Click the Save button.
6. Repeat steps 3-5 until Cities are mapped to all Geographic Regions.

Determine Clusters

HIFIS is a tool for coordinated access. A core principle related to HIFIS is the ability to access client data across service providers, so service providers helping a client can see the same information. This benefits the individual as they can be referred to the support services that will best help them without having to tell their story multiple times.

This is accomplished by the creation of one client record for each client. When the client consents to share data among service providers, a record is created that is visible to multiple service providers (to the level of detail appropriate for their role).

Although the single shared client record is a core concept in HIFIS, in some instances, data sharing across the community is not appropriate due to safety and privacy considerations. In cases where a service provider or group of service providers cannot share any of their client information with other service providers, such as a Violence Against Women (VAW) shelter, a separate cluster can be created for these service providers. In cases where a client is served by service providers in different clusters, the record of this client will be created in each cluster without the possibility of it being shared.

Note: A service provider can have access to the client information of any client in the community who gives consent to data sharing (when the legal framework is established). Assigning user rights and service provider settings allows for the management of information.

When HIFIS is first installed, only one cluster exists — the Integrated Cluster. Additional clusters can be added for VAWs or other organizations that require their data not be shared.

How to Enter Clusters

Steps to follow:

1. From the Administration menu, select Application Settings.
2. On the Application Settings screen, select the Clusters tab.
3. Click the Add Cluster button.
4. Enter the name of the cluster.
5. Indicate whether client consent is enforced in the cluster. If Yes, users will be required to enter client consent information when the client record is created.
6. If applicable, enter how many days until client consent expires.
7. Indicate whether sharing will be enabled. Some fields in HIFIS have an additional level of security and can be hidden from other service providers (e.g. Financial Profile, Health Information). If sharing is enabled, when adding financial or health information, users will be able to select whether this should be shared or modified among service providers.
8. Indicate whether client search will be restricted. If set to Yes, client searches performed without anything entered in the Client Search field will not return any results.
9. Indicate whether shelter stays will appear in a client's Housing History by default or if they are hidden.

Note: Only users with the user right to the Admissions module will be able to see (or export) shelter stays in the Housing History tab.

10. If applicable, enter the minimum age of consent.
11. Indicate whether users will have to provide attestation before they are able to view client records.
12. Enter the Inactivity Threshold.

Note: The Inactivity Threshold represents the number of days that have lapsed between transactions before the Client State is changed automatically to Inactive. Inactive clients do not appear on the Unique Identifier List. The range of the threshold is 1 to 1095 days, with the default value set to 90 days.

13. Enter the Housing Inactivity Threshold.

Note: The Housing Inactivity Threshold produces a reminder at the top of a client's profile if their information has not been updated in a set number of days. This allows communities to align reminders with their policies or protocols related to keeping HIFIS information current.

14. If applicable, enter the text that will be presented to users when they are providing attestation.
15. Click the Save button.

Helpful Hint: Enabling attestation creates a pop-up that allows the end user to verify the proper client file. The attestation message can be customized based on the community requirements. Once a service provider attests to providing services to a client, the attestation will no longer appear.

Service Providers

The Service Provider module defines the organizations involved in the implementation of HIFIS, as well as the services that are offered in the community. Defining each service provider allows users to be attached to their service provider.

Establishing Service Providers has three main functions:

- Reporting;
- Determining mandatory fields; and,
- Determining look-up table values.

These three functions can be customized within each service provider to allow for: reporting at the service provider level (while also reporting on a group of service providers, or at the community level), the creation of different mandatory fields for different service providers, and the creation of different look-up table values for different service providers.

By default, service providers are primary service providers; however, HIFIS also has the ability to create secondary service providers, whose mandatory fields can be modified by the primary service provider. This gives a primary service provider an additional level of control over the secondary service provider.

Further details about determining which organizations are service providers can be found in the HIFIS Implementation Guide.

Determine Service Provider Profiles

A HIFIS implementation can include multiple service providers. The following items are identified for each service provider during implementation:

- Name and contact information
- Type of site – A service provider type will be set up and configured to suit how they will use HIFIS. For example, shelters and non-shelters will vary in their set-up (e.g. non-shelters will not use any of the emergency bed features of HIFIS.)
- Information about staff who will use HIFIS: This will help with the initial set-up of user accounts.
- Genders served
- Client Type — adult, youth, children, male only, female only, ages served (maximum and minimum)
- Funding programs
- Room and bed information

Enter and Manage Service Providers

The Service Provider Details Page lists the fields that must be filled to create a service provider. With the exception of Cluster and Primary Service Provider, the remaining fields act as tags to identify the service provider's role within the system.

How to Add a Service Provider

Steps to follow:

1. From the Administration menu, select Service Providers.
2. On the Service Provider Details page, expand the Service Provider Management menu and select List of Service Providers.
3. On the Service Provider List page, select the Add Service Provider button.
4. On the Service Provider Details page, enter the service provider's name.
5. Indicate whether the service provider is part of an existing cluster.
    - If Yes, select the cluster the service provider will join.
    - If No, enter the name of the new cluster.
6. Select the type of service provider.
7. If applicable, if you are adding a secondary service provider, select the primary service provider. A secondary service provider will be able to inherit mandatory data fields of a primary service provider.
8. If applicable, select the genders served, other attributes and services offered at the service provider.
9. If applicable, select the target clientele, the referrer category type and indicate whether the service provider allows concurrent stays.

Note: Concurrent stays allow a client to be booked into multiple shelters at the same time.

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10. If applicable, indicate whether the service provider is active.
11. If applicable, select a service provider from which it is possible to copy mandatories. This will duplicate the existing settings (for mandatories) from the selected service providers to the newly created service provider. Once a provider is created, you can further customize the mandatories as you like, with no impact on the other service provider, unless mandatories are required by the parent primary service provider.

Helpful Hint: Setting Mandatories can be done more easily when all the HIFIS Service Providers have been created. This will give a Primary Service Provider the ability to simultaneously apply the same mandatory to the Secondary Service Providers in the tree structure. This will reduce the need to visit each HIFIS Service Provider's settings individually to make the same customization.

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12. If applicable, enter the cut-off time and the service provider's contact information in the Telephone, Extension, Fax Number, Email Address and Website fields.
13. If applicable, add any additional information concerning the service provider in the Comments field.
14. Select the Address tab, and enter the service provider's address by entering information in the Address Line 1, Country, Province/Territory and City fields.
15. If applicable, complete the Place Name, Address Line 2, Postal Code and Geographic Region fields.
16. Click the Save button.

How to Enter a Service Provider's Settings

Service Provider Settings allow the Administrator to customize what types of clients the service provider can access within the database (e.g., by gender, or by age) and other features.

Steps to follow:

1. From the Administration menu, select Service Provider.

Note: Clicking on Service Provider in the Administration menu will bring you directly to the service provider's details page for which you are logged in. To define the settings for another service provider, expand the Service Provider Management menu and select List of Service providers. In the Service Provider List page, type to search for a service provider or click the Expand/Collapse Tree button to see the whole service provider hierarchy. Locate the service provider for which you want to define the settings and click on the service provider name. Open the Service Provider menu and select Settings.

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2. On the Service Provider Details page, click the Service Provider Management menu and select Settings.
3. From the Service Provider Settings page, indicate whether users logged in under this service provider will be able to see adult males, adult females, youth or children.
4. Select the maximum childhood and youth ages.
5. Select the minimum senior and family head ages.
6. If custom tables are created at this service provider, enter the name of the custom table tab.
7. Indicate whether this service provider data is hidden from other service providers.
8. Indicate whether the default room and bed display should be expanded or minimized. At the intake, the beds are always displayed as expanded icons.
9. Click the Save button.

Helpful Hint: The Hide Service Provider Data setting allows all the information entered in the Client Management menu to be hidden from other service providers.

How to Add Rooms and Beds

Steps to follow:

1. From the Administration menu, select Service Providers.

Note: Clicking on Service Providers in the Administration menu will bring you directly to the Service Provider's Details page for which you are logged in. To define the settings for another service provider, expand the Service Provider Management menu and select List of Service providers. In the Service Provider List page, type to search for a service provider or click the Expand/Collapse Tree button to see the whole service provider hierarchy. Locate the service provider for which you want to define the settings and click on the service provider name. Open the Service Provider menu and select Settings.

2. On the Service Provider Details page, click the Service Provider Management menu and select Rooms and Beds.
3. From the Rooms and Beds page, click the Add Room button.
4. Enter the name of the room, the start index and the number of additional rooms to be added, if applicable.
5. Indicate whether the room is active.
6. Click the Save button.
7. From the room list, locate the room to which you want to add a bed and select the Manage Beds button.
8. From the Manage Beds page, select the Add Bed button.
9. Enter the name of the bed, the start index and the number of additional beds to be added, if applicable.
10. Select the type and status of the bed.

Note: specifying this has no impact on the HIFIS behaviour but it will allow the service provider to describe the beds available for clients.

11. Indicate whether the bed is an overflow bed, and whether the bed is mobile.

Note: specifying this has no impact on the HIFIS behaviour but it will allow the service provider to describe the beds available for clients.

12. Indicate whether the bed is active.
13. If applicable, set the effective date that the bed becomes active.

14. Click the Save button.

Helpful Hint: Note that if beds are located in different rooms, they can have the same bed number. For example, room number 101 can have a bed numbered 1, and room number 202 can have a bed with the same bed number, although these are two separate beds.

How to Set the Service Provider's Mandatory and Disabled Fields

Steps to follow:

1. From the Administration menu, select Service providers.

Note: Clicking on Service Provider in the Administration menu will bring you directly to the service provider's details page for which you are logged in. To define the settings for another service provider, expand the Service Provider Management menu and select List of Service providers. In the Service Provider List page, type to search for a service provider or click the Expand/Collapse Tree button to see the whole service provider hierarchy. Locate the service provider for which you want to define the settings and click on the service provider name. Open the Service Provider menu and select Settings.

2. On the Service Provider Details page, click the Service Provider Management menu and select Mandatories.
3. In the Service Provider Mandatories page, select any of the sections to expand the content.
4. Select the desired module and expand the content to select which field to force as mandatory or mark as disabled.
    - Marking an item as mandatory will add a red star after the field and force users to enter information in this field before saving.
    - Marking an item as disabled will grey out the field and users will not be able to enter any information or attach documents.

Note: Once a selection is made, a green checkmark will appear. The changes are saved automatically.

Link Service Provider to Configuration Items

How to Link a Service Provider to Rights Templates

If a service provider is going to be managing its own users, it needs to be linked to the rights templates it will be assigning to the users.

If you have not created Rights Templates, see the Rights Templates section.

Steps to follow:

1. From the Administration menu, select Rights Templates.
2. On the Rights Template List page, locate the rights template to which you want to link the service provider. Click the Edit button.
3. From the Edit User Template page, in the Service Provider field, select the service provider(s) you want to allow to use the template.
4. Click the Save button.

How to Link a Service Provider to Custom Tables

To be able to view and use a custom table, a service provider must be linked to it.

Steps to follow:

1. From the Administration menu, select Custom Tables.
2. On the Custom Table List page, locate the custom table you want to link to the service provider. Click the Table button.
3. From the Edit Custom Table page, in the Service Provider field, select the service provider(s) you want to link to the custom table.
4. Click the Save button.

Programs

The Programs module is used to define the programs used by the service provider and the community.

HIFIS can be configured so that client transactions or services can be associated to a particular program. For example, HIFIS can record that all goods and services provided to a client were captured under a program called Homelessness Prevention. One or more services can be associated with a program.

For more details, refer to the HIFIS Implementation Guide.

Enter and Manage Programs

How to Add a Program

Steps to follow:

1. From the Administration menu, select Programs.
2. On the Program List page, click Add Program.
3. On the Add Program page, enter the name of the program.
4. Select the program type to categorize the program.
5. If applicable, enter the owner of the program.

Note: Once saved, only the owner will be able to make changes to the program.

6. Select the services to which the program may be linked. This will make the program visible in the selected modules.
7. Confirm the accuracy of the start date and, if applicable, enter the end date.
8. If applicable, enter the total amount of funding per period.

Note: If Stay was selected in the Services field, then enter the maximum number of beds per period, if applicable.

9. If applicable, enter the time unit.
10. If applicable, enter the rate of the program.
11. If applicable, indicate whether the program is active. Only active programs will appear in drop down lists.
12. If applicable, add any additional information concerning the program in the Comments field.
13. Click the Save button.

How to Edit a Program

Steps to follow:

1. From the Administration menu, select Programs.
2. On the Program List page, locate the program you want to modify and click the Manage button.
3. On the Display Programs page, select the Details tab and click the Edit button.
4. On the Edit Program Details page, you can edit the existing information or add any missing information.
5. Click the Save button.

How to Link a Program to One or Multiple Service Providers

Linking a service provider to a program will allow the program to be selected in the Programs drop down list in the HIFIS module when the user is connected to the service provider. Only service providers that have been linked to the program will be able to select the program in HIFIS modules.

Steps to follow:

1. From the Administration menu, select Programs.
2. On the Program List page, locate the program to which you want to add a service provider and click the Manage button.
3. Select the Service Providers tab, then click the Add Service Provider button.
4. On the Add Service Provider window, select the service provider.
5. Enter the start date and, if applicable, the end date.

Note: If the start date is already entered, confirm its accuracy.

6. If applicable, enter the allocated funding per period and allocated beds per period, as well as the time unit and rate.
7. If applicable, add any additional information in the Comments field.
8. Click the Save button.

How to Add a Fixed Cost to a Program

A fixed cost is a non-variable operation expenditures covered by the program for the specified period (i.e. a mortgage payment, or property taxes, which are a fixed cost that must be paid every month.)

Steps to follow:

1. From the Administration menu, select Programs.
2. On the Programs List page, locate the program to which you want to add a fixed cost and click the Manage button.
3. On the Display Program page, select the Fixed Costs tab, then click the Add Fixed Cost button.

4. If applicable, in the Add Fixed Cost window, enter the fixed cost amount.
5. Enter a description of the fixed cost.
6. If applicable, enter the start and end dates.
7. If applicable, select whether the fixed cost will show on reports.

Note: If the start date is already entered, confirm its accuracy.

8. Click the Save button.

How to Edit a Program's Fixed Cost

Steps to follow:

1. From the Administration menu, select Programs.
2. On the Programs List page, locate the program with the fixed cost you want to modify and click the Manage button.
3. Select the Fixed Costs tab, then locate the fixed cost you want to modify and click the Edit button.
4. On the Edit Fixed Cost page, you can edit the existing information or add any missing information.
5. Click the Save button.

Users

Create User Accounts in Service Providers

Individuals needs a HIFIS account in order to input or view data in the system. The Users module gives the ability to create an account, configure access rights, consult users' activities, activate or deactivate the account, lock or unlock the account, reinitialize information access, etc.

Helpful Hint: If Users will have access to multiple HIFIS Service Providers, completing the set-up phase for all HIFIS Service Providers before creating the Users will allow the Administrator to more easily add HIFIS Service Providers and apply access rights. This will limit the need to revisit each user every time a new HIFIS Service Provider is created.

How to Add a User

Steps to follow:

1. From the Administration menu, select Users.
2. On the User List page, select the New User button.
3. On the Add User Profile page, enter the user name that will be used when logging into HIFIS.
4. Enter the user's first and last name.
5. If applicable, enter the user's email address.
6. Select the user's gender.
7. Select the language in which HIFIS will launch when the user logs in.
8. Indicate whether the user account will allow concurrent logins. Concurrent logins will allow multiple users to connect using the same user account at the same time. **Note**: Consider potential confidentiality issues if concurrent logins are authorized.
9. Select the service provider(s) with which the user has associated access rights.
10. Select the appropriate Service Provider from the dropdown menu next to Default Service Provider.
11. If applicable, enter the categories of reports to which the user will have access.

Note: If user rights are granted to the user via a rights template, the reports to which the user has access will be determined based on the rights template rather than what is entered on the user profile.

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12. Select the user's role(s).

Note: If the user is a caseworker, ensure that Caseworker is selected for their name to appear in the Caseworker field throughout HIFIS. If the user has the authority to add Service Restrictions, ensure that Staff is selected for their name to appear in the dropdown of the Service Restriction module.

13. If applicable, add any additional information concerning the user in the Comments field.
14. If applicable, enter a security key for this user. This is the secondary password if two-factor authentication is turned on under Application Settings.
15. Click the Save button.

Note: The user will be inactive until they are activated. Go to the Quick Access Buttons to activate or deactivate the account.

How to Add Contact Information to a User Profile

Once the user account is created, it is now possible to add contact information.

Steps to follow:

1. From the Administration menu, select Users.
2. From the Users List page, locate the user for whom you want to add contact information and click the User Account button.
3. In the User Account page, click the Contact Information tab.
4. Select the means of communication.
5. Enter information in the Value field.
6. Click the Save button.

Note: The contact information will now appear in the Existing Contact Information table.

How to Assign Rights to a User

User Rights can be assigned two ways:

1. Select a rights template to assign to the user. If Rights Templates have not been created, see Rights Templates; or,
2. Assign individual rights by searching for a specific module or by expanding the rights tree and then clicking the checkbox to give or take away rights. Giving rights this way does not require you to use the save button, as changes will be recorded immediately.

Steps to follow:

1. From the Administration menu, select Users.

2. From the User List page, locate the user to whom you want to assign rights and click the User Account button.
3. On the User Account page, click on the Rights tab then select which service provider will be affected by those rights.
4. Repeat these steps for all service providers to which the user needs access.

Rights Templates

The Rights Templates module is used to create pre-set rights that can be applied to users in a quick and efficient way when creating a new user profile.

Rights templates are set up to reflect the various types of users that will be using the system (e.g. Shelter Worker, Outreach Worker, Case Manager, Site Administrator, etc.). Identifying and grouping the types of users service providers employ can help define the rights templates that will reflect what each group can and cannot do in the system.

There are six basic types of rights for HIFIS modules:

1. **List**: Allows the user to view the list of records for a module accessed from the Front Desk menu for the service provider they are currently logged into.
2. **Display**: Allows the user to open and view records for the service provider they are currently logged into.
3. **List Client**: Allows the user to see records for all service providers in the various sections of the Client Management menu.
4. **Add**: Allows the user to add records.
5. **Edit**: Allows the user to edit records.
6. **Delete**: Allows the user to delete records. Service records must be deleted using the Client Service Delete function.

Note: The types of rights that can be configured vary by module.

For more information, see the HIFIS Implementation Guide.

Enter and Manage Rights Templates

How to Add a Rights Template

Steps to follow:

1. From the Administration menu, select Rights Template.
2. On the Rights Template List page, select the Add Template button.
3. On the Add Template page, enter the name of the template.
4. Select the owner of the template. Only the owner of the template can modify it once it is saved.
5. Select the service provider(s) to whom the template will apply.
6. If applicable, select the report categories that a user who is assigned this rights template will have access.
7. If applicable, select the template you wish to copy as a base for the new template.

8. Indicate whether the template is active.
9. If applicable, add any additional information concerning the template in the Description field.
10. Click the Save button.
11. In the Edit User Template page, click in the Template Rights tab and expand the Rights tree.
12. Expand the Rights tree.
13. Click the checkboxes for the User Rights you wish to add to the template.

Note: Once a selection is made, the changes are automatically saved.

How to Edit a Rights Template

Steps to follow:

1. From the Administration menu, select Rights Templates.
2. On the Rights Template List page, locate the template you want to edit and select the Edit button.
3. Within the Template Details tab, you can edit the existing information or add any missing information.
4. Click the Save button.
5. Within the Template Rights tab, expand the Rights tree and locate the rights you want to add or remove to the template in the rights list.
6. Click the checkbox to add or delete a right.

Note: Once a selection is made, the changes are automatically saved.

Reporting

It is important to document the reporting needs of a community and an organization, then determine if they are met by the standard reports that come with HIFIS, or if additional custom reports are required. If custom reports are developed, they can be uploaded to HIFIS in the Administration section of the system.

Important: HIFIS uses Crystal Reports to provide real-time integrated reporting. Because Crystal Reports provides data directly from the HIFIS database it is important to control access to both built-in and custom reports for HIFIS users insofar as it is necessary for the users to do their tasks to protect clients' privacy.

Please refer to the HIFIS Implementation Guide for more details on reporting.

Uploading and Editing Reports

How to Upload Reports

Steps to follow:

1. From the Reports menu, select Reports Manager.
2. From the Report Manager page, select the Add Report tab.
3. Enter the name of the report.
4. Enter a description of the report.
5. Select the report categories.

Note: The Report Categories field governs what reports a user can access.

If the user has been assigned rights using a Rights Template, users will have access to reports where the Report Categories of the report and the Rights Template match.

If the user has not been assigned rights using a Rights Template, users will have access to reports where the report categories of the report and the user profile match.

6. Select the service providers that will have access to the report, allowing them to generate corresponding reports.
7. Click the Choose File button to select which report file you want to upload.
8. Click the Upload button.

How to Edit Reports

1. From the Reports menu, select Reports Manager.
2. From the Report Manager page, select the HIFIS Reports tab.
3. Locate the report you wish to edit and select the Edit button.

4. Modify the Name, Description, Report Categories, and Service Providers as required.
5. Click Save.

Report Access Management

Configuring access rights for HIFIS reports is accomplished by using Rights Templates and by editing the Report Categories and Service Providers associated directly with a specific report. For a HIFIS user to be able to run a specific HIFIS report, they must:

- Have the appropriate user rights (either through a Rights Template or individual rights) to be able to view and generate reports in the Reports Manager;
- Be assigned a Rights Template with a Report Category that matches at least one of the Report Categories assigned to the report they seek to generate, or be assigned a matching Report Category through their user profile if their user rights are not determined by a rights template; and,
- Be logged into a service provider that has been assigned to the report they seek to generate.

Report Categories can be created and modified in the “Report Categories” look-up table. These report categories can be assigned to both built-in and custom reports in HIFIS, and only users who meet the criteria above will be able to generate reports.

Reporting FAQs

A user is trying to run a report. On the Report Parameters screen, the service provider for which they’re trying to run the report isn’t appearing in the list displayed in the Enter Service Providers field. Why not?

There are several reasons this might occur, including:

- The Rights Template assigned to the user for that service provider doesn’t include the Generate Reports right. It will need to be added to the Rights Template to enable the user to run the report for the service provider.
- The user has been assigned rights (either through a Rights Template or individual rights), but not at the service provider for which they want to run the report.

I want to set up a user so they can only run a specific report for specific service providers. How do I do this?

To set this up:

1. In Administration – Look-up Tables, add a new/unique value to the Report Categories look-up table.
2. Edit the report to which you want the user to have access — add the new Report Category to the report.

3. Create a Rights Template that includes:
    - The new Report Category
    - The service providers for which you want the user to be able to run the report
    - The Generate Reports right
4. Assign the Rights template to the user for the service providers for whom you want them to be able to run the report.

Housing Continuum

The Reaching Home Continuum

All versions of HIFIS 4.0.59 and later include a housing continuum called "Reaching Home", which can be viewed by selecting Housing Continuum in the Administration Tab. The Unique Identifier List and the Coordinated Access functions of HIFIS reference the Reaching Home Continuum.

Note: This guide reflects the Reaching Home Housing Continuum in HIFIS version 4.0.60. For information on the Reaching Home Housing Continuum in the previous version of HIFIS, see the HIFIS Release 4.0.59.1 Reference Guide.

By default, clients with a Housing Status of Transitional or Public Institution are considered Homeless by HIFIS and, as such, can be included in the Unique Identifier List if they meet all other criteria. Some communities may choose to consider people with these Housing Statuses as Housed, and HIFIS Administrators can reconfigure the roll-up value of the Transitional and Public Institution housing continuum categories to Housed. Doing so will exclude these clients from the Unique Identifier List.

Note: Once the local configuration decision has been made, it is recommended to not change this setting again. Changing the setting numerous times by switching it back and forth between "homeless" and "housed" may cause errors.

How to Configure the Transitional and Public Institution Housing Continuum Categories

1. From the Administration menu, select Housing Continuum.
2. Navigate to the Reaching Home / Vers un chez-soi housing continuum.
3. Click the Manage button.
4. Locate the Public Institution or Transitional housing continuum category and click the Edit button.
5. From the dropdown menu, select Housed / Logé or Homeless / En situation d'itinérance, depending on your community's requirements.
6. Click Save.

Enter and Manage Housing Continuum

The Housing Continuum module allows the administrator to assign a category for various housing types in order to track a client's progress out of homelessness. Categories to be used in a housing continuum (e.g. emergency shelter, supportive housing) need to be defined prior to implementing HIFIS. Once the categories have been defined, it is also necessary to identify which specific housing types belong in each category.

Note: The Housing Continuum can be changed and updated as definitions and priorities evolve.

How to Add a Housing Continuum

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, select Add Housing Continuum.
3. Enter the name of the housing continuum.
4. Click the Save button.

How to Add a Housing Continuum Category

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, locate the Housing Continuum to which you want to add a category and select the Manage button.
3. On the Manage page, select the Add Category button.
4. Enter the name of the category.
5. If applicable, select the housing types to be included in the housing continuum category.
6. Click the Save button.

How to Change the Order of Housing Continuum Categories

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, locate the Housing Continuum you want to modify and select the Manage button.
3. On the Manage page, select the Change Category Order button.
4. On the Change Category Order page, click and drag the categories to change the order.
5. Click the Save button.

How to Edit a Housing Continuum Category

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, locate the Housing Continuum you want to modify and click the Manage button.

3. On the Manage page, locate the category you want to modify and click the Edit button.
4. On the Update Category page, you can edit the existing information or add any missing information.
5. Click the Save button.

How to Delete a Housing Continuum Category

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, locate the Housing Continuum from which you want to delete a category and select the Manage button.
3. On the Manage page, locate the category you want to delete and select the Delete button.
4. Select Delete from the confirmation pop-up window.

How to Add a Housing Type to a Housing Continuum Category

Steps to follow:

1. From the Administration menu, select Housing Continuum.
2. On the Housing Continuum List page, locate the Housing Continuum to which you want to add a category and select the Manage button.
3. In the Manage page, locate the housing continuum category to which you want to add a housing type and select the Edit button.
4. Click in the Housing Types field and select the housing type(s) you want to add to the category.
5. Click the Save button.

Look-Up Tables

The Look-up Tables module is used to add, edit or remove any of the look-up values that appear in the drop-down lists throughout HIFIS. The configuration of look-up tables allows the Administrator to make changes to values, not the tables themselves. For example, it is not possible to add a look-up table. However, it is possible to consider configuring custom tables. It is also not possible to delete a table, but it is possible to consider setting the field associated to the table to inactive.

Note: Certain drop-down lists and their standard values are mandatory and therefore cannot be modified (e.g., the non-directly identifiable data fields that are provided to INFC).

Please refer to the HIFIS Implementation Guide for more information about determining look-up values in Drop-Down Menus and Look-up Table Values.

Enter and Manage Look-Up Table Values

How to Add a Look-Up Value

Steps to follow:

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Table List page, locate the table to which you want to add a value and click the Customize Look-up Table Values button.
3. On the Customize Look-up Table Values page, select Add Look-up Value to create a new look-up value.
4. Enter the English and French name of the look-up value.
5. Select the roll-up value of the look-up value.
6. Indicate whether you wish to subscribe to the look-up value.
7. If applicable, select additional service providers that should be subscribed to the look-up value.
8. Click the Save button.

Note: The look-up value will now appear in the Look-up table.

How to Deactivate a Look-Up Value

Steps to follow:

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Table List page, locate the table you want to modify and click the Customize Look-up Table Values button.

3. On the Customize Look-up Table Values page, locate the look-up you want to deactivate and select the Unsubscribe button.

Note: Changes are automatically saved once a selection is made.

How to Edit a Look-Up Table Value

Steps to follow:

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Table List page, locate the table in which the field you want to modify is found and click the Customize Look-up Table Values.
3. On the Customize Look-up Table Values page, locate the look-up you want to modify and click the Edit button.

Note: Users with the necessary rights can only modify look-up values that have been added at the service provider to which they are connected.

4. On the Edit Look-up Value page, you can edit the existing information or add any missing information.
5. Click the Save button.

How to Edit the Look-Up Table Order

Steps to follow:

1. From the Administration menu, select Look-up Tables.
2. On the Look-up Table List page, locate the table for which you want to modify the table order and click the Customize Look-up Table button.
3. On the Customize Look-up Table Values page, click the Sort Look-up Table Values button.
4. From the Sort Look-up Table Values screen, modify the order of the fields by selecting and dragging the fields up and down the list or click the Alphabetical Order button to sort the values alphabetically.
5. Click the Save button once the modifications to the look-up table order are complete.

Directory of Services

The Directory of Services module is used to record the location and contact information for various places used in multiple HIFIS modules, such as a pharmacy for when adding medication records or a school for education records.

For those familiar with HIFIS 3.8, the Referrers module found in the Localised Tables menu has been implemented into the Directory of Services module.

It is important to organize and create the most commonly used places in HIFIS during the initial set up of the system. After the system is implemented, users who have the rights can continue to enter new places into the system as they are identified.

Helpful Hint: Adding entries to the Directory of Services is how the Referred To and Referred From drop-down lists are populated.

Please refer to the HIFIS Implementation Guide for information about determining places to enter in the Directory of Services.

Enter and Manage Places in the Directory of Services

How to Add a Place

Steps to follow:

1. From the Front Desk menu, select Directory of Services.
2. On the Directory of Services page, click the Add Place button.
3. Enter the place’s name.
4. Select the type of place.
5. If applicable, select the type of services offered.
6. Indicate whether or not the place is active.
7. If applicable, add people who may be associated with this place.
8. Select the referrer category type.
9. Indicate whether clients can be referred from and/or to this place.
10. If applicable, add any additional information concerning the place in the Comments field.
11. Enter the place’s Country, Province/Territory and City. If applicable, enter the place’s address by entering information in the Address Line 1, Postal Code and Geographic Region fields.
12. Click the Save button.

How to Edit a Place Record

Steps to follow:

1. From the Front Desk menu, select Directory of Services.
2. On the Directory of Services page, locate the place you want to modify and click the Edit button.
3. On the Place Details page, you can edit the existing information or add any missing information.
4. Click the Save button.

Food Bank Items

Food items used in the Food Banks module are created in the Food Bank Item module.

Identifying the most common food bank items provided by service providers will allow users to include these transactions in their record keeping. After the system is implemented, users can continue to enter new food bank items into the system as items are identified.

Enter and Manage Food Bank Items

How to Add a Food Bank Item

Steps to follow:

1. From the Administration menu, select Food Bank Items.
2. At the bottom of the Food Bank Items List page, select Add Food Bank Item.
3. Select the Behaviour Type for the food item.
4. Enter the English and French name of the item.
5. Select the number of days for which the item is covered.
6. If applicable, enter the cost of the item for the service provider.
7. Enter the number of adults and children that the item can feed.
8. Indicate whether or not the food bank item is active.
9. If applicable, enter a product code for the food bank item.
10. Click the Save button.

How to Edit a Food Bank Item

Steps to follow:

1. From the Administration menu, select Food Bank Items.
2. On the Food Bank Items List page, locate the food bank item you want to modify and click the Edit button.
3. On the Edit Food Bank Item page, you can edit the existing information or add any missing information.
4. Click the Save button.