The implementation of a community-based platform requires careful planning, project management, governance, and the collaboration of dedicated service providers. This checklist outlines what is required to support the implementation of HIFIS 4. Note that this is not a sequential list. There may be additional requirements specific to the local context.

1 • PLANNING

It is critical that communities take the time to thoroughly plan when implementing the HIFIS platform. Understanding why, who and how will help strengthen relationships in the community and support the platform deployment.

1.1 IDENTIFY STAKEHOLDERS
Find the partners you need for a successful implementation

- ☐ Connect with the identified Community Entity organization and determine collaboration potential
- ☐ Determine project partners and create steering committee
- ☐ Assess community-level and organization-level needs
- ☐ Engage with key stakeholders and subject matter experts to determine objectives
- ☐ Identify the organization that will host the server

1.2 CREATE A GOVERNANCE STRUCTURE
Establish processes and guidelines for software use and administration

- ☐ Create working groups on Data, Privacy, and Technical considerations to guide decisions
- ☐ Determine the decision-making process
- ☐ Establish reporting and management processes
- ☐ Assign management responsibilities (e.g., project manager, technical system manager, etc.)
- ☐ Develop a project timeline
- ☐ Create a communication plan before, during and after implementation, including Q&As

2 • HIFIS PLATFORM DECISIONS

Communities should first understand its HIFIS goals and desired outcomes before making decisions about how the HIFIS platform will function and tackling the technical requirements needed to implement HIFIS 4. Additionally, it is crucial to engage in policy and legal considerations. Data sharing among community service providers will require stringent privacy and security protections. All data sharing will be contingent upon written client consent, and must comply with local, provincial, and federal legal requirements.

2.1 DESIGN A COMMUNITY SYSTEM
Establish your community's coordinated workflow in the HIFIS context

- ☐ Determine scope of HIFIS integration in community system
- ☐ Identify the HIFIS features available to partners in the community
- ☐ Develop a Data Sharing Agreement (DSA) between Site Coordinators and Service Providers to guide data sharing and document privacy and security protocol decisions
- ☐ Agree on community-wide business processes for client intake, referrals, and management
- ☐ Develop a Service Level Agreement (SLA) between Site Coordinators and Service Providers to govern platform use and partnerships between shelter and client
- ☐ Determine the common Consent form for clients that explains the use of their information

2.2 SET DATA STANDARDS
Determine your data needs and set your minimum requirements

- ☐ Develop reporting requirements and set data fields
- ☐ Determine minimum and universal data to collect
- ☐ Identify data standards (e.g. create community data dictionary)
- ☐ Establish general user data access rights and guidelines
- ☐ Evaluate the need and the capacity to convert existing data (starting anew, data-conversion for active data, and/or data-conversion for historical data)

3 • TECHNICAL DECISIONS

In order for HIFIS 4 to respond to the needs of the community, important technical decisions should be considered. Understanding what the platform offers and how the technology can be leveraged, will help communities determine how to configure the platform so that it is tailored to meet their specific needs.

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8:30am - 4:30pm EST

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3.1 PREPARE FOR INSTALLATION
Make technical decisions and ensure infrastructure is prepared to support them

- ☐ Determine technical scope of HIFIS system (expected number of users, transactions, etc.)
- ☐ Assess the scalability and flexibility needs in the community
- ☐ Assess infrastructure capacity and purchasing needs
- ☐ Determine how local technical support will be provided

3.2 CUSTOMIZE THE PLATFORM
Configure the software to meet the needs and characteristics of the community

- ☐ Sign the Data Provision Agreement (DPA) between Site Coordinators and Government of Canada to allow the use and customization of HIFIS and data sharing (to be provided and signed on receipt of HIFIS)
- ☐ Install and perform basic system configuration of application settings
- ☐ Set user protocols, including password access protocols, and create a user guide

3.3 SYSTEM SECURITY
Designing and maintaining a secure system is essential to the ongoing use and integrity of HIFIS

- ☐ Create user accounts with appropriate level of user rights
- ☐ Set data storage protections
- ☐ Determine backup procedures

4 • MANAGEMENT AND IMPLEMENTATION STRATEGIES

To manage and implement HIFIS 4 successfully, communities will need to consider the operational aspects when deciding on a management model, and the changes that implementation will bring. Additionally, a staffing structure that includes consultants with technical expertise to maintain the day-to-day system operations, user support, troubleshooting, and routine maintenance of the HIFIS platform is crucial to a successful HIFIS implementation.

4.1 GET READY TO GO LIVE
Put the pieces in place for a smooth implementation

- ☐ Perform technical and network testing
- ☐ Define staff roles and responsibilities for the long term (e.g., administrators and super users, training and technical assistance, communication, reporting, etc) and provide user access rights accordingly
- ☐ Choose deployment strategy (e.g., pilot, phase-in, etc.) and create implementation plan
- ☐ Choose and configure system security mechanisms

4.2 TRAINING
All staff require training and access to resources

- ☐ Develop a training plan for supervisors, case managers, support staff
- ☐ Determine who will provide ongoing training and technical support
- ☐ Set up a plan for continuous training after implementation (annual training recommended)
- ☐ Develop training resources
- ☐ Provide targeted training sessions for users and administrators, case managers, etc.
- ☐ Develop a feedback mechanism for use during and after the implementation process

5 • OPERATING PROCEDURES AND PROTOCOLS

Considerations to system maintenance (all of the activities to sustain the operation of the system) and system modification (ongoing system enhancement activities to improve and expand the system to keep pace with local needs) should be determined.

5.1 ONGOING SUPPORT
Long term platform maintenance requires careful planning

- ☐ Establish a support strategy, including super-users, Q&As, etc.
- ☐ Develop troubleshooting protocols and resources
- ☐ Develop plans for system maintenance and data integrity

5.2 REPORTING PROTOCOLS
Long term platform maintenance requires careful planning

- ☐ Generate information on homelessness situation for planning, advocacy and reporting requirements
- ☐ Create custom reports to meet end user requirements
- ☐ Monitor, approve and share data collected by HIFIS
- ☐ Provide regular reports to stakeholders including service providers and the greater community

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