
SMIS REPORT DETAILS

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Version 1.3*

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The following pages contain detailed documentation of all reports currently in SMIS production.

Note that all private and confidential information have been removed from all screen and report samples in this document. Therefore, Client ID, Client Name, User ID and User Name and some other private information columns are left blank.

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1. Client Report – Bedded Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: All Program Users

Description:

The Program based report shows currently active clients or clients admitted within the last 60 days and their basic occupancy and case note count information in a detailed tabular format. The beginning of the report also displays Program profile and report parameter information.

You can also filter this report for Clients who are assigned to any particular staff upon admission.

You can download this report to an excel document and then sort according to any of the columns.
You can download to a PDF for a printable version.

Report Parameters:

Type of Report	(i.e. <i>Active Clients, Clients within the past 60 days</i>)
Primary Worker	(staff selected in the Client Admission screen)

Report Headers:

Active Clients (Bed)

Reporting Period: 2012/04/10	<i>Will only be available for the day you are printing the report</i>
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This is the Program information populated automatically			
Name	<i>Program Name</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Program phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds allowed in the Facility space that houses the Program</i>
Funding Capacity:	<i>Max. # of funded beds based upon Program Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Type of Report	Active Clients or Client who were	Primary Worker	Any	<i>You can run this report for specific staff members.</i>
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	at any point active in the past 60 days			
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Report Detail (Fields):

FIELD NAME	DESCRIPTION
Client No.	SMIS client ID
Last Name	Client's lastname
First Name	Client's firstname
Admission Date	Most recent client's admission date into this program
Room	Room ID
Bed	Bed ID
PNA Eligibility	Last PNA eligibility TO date
Most Recent Case Note	Creation date of most recent case note (maybe complete or incomplete)
Incomplete Case Notes	Count of incomplete case notes
Primary Worker	Name of primary worker assigned to client in admission screen


Export Options:

[Excel](#)

[PDF](#)

Report Sample Screen:

Client Report - Windows Internet Explorer



Active Clients (Bed)

Print Close

Printed: 2012/10/25

Reporting Period: 2012/10/25

Name:	Connerstone Place	Facility:	Connerstone Place 833 St.Clair W
Description:	Provide Shelter for 50 Men, 25 years and over	Phone:	416-658-5224
Health Information Custodian:	Yes	Type:	Bed
Status:	Active	Spec Capacity:	52
Funding Capacity:	50	Male/Female:	Male
Minimum Age:	25	Maximum Age:	78

Type of Report: Primary Worker:

[Excel](#) [PDF](#)

Client No.	Last Name	First Name	Admission Date	Room	Bed	PNA Eligibility	Most Recent Case Note	Incomplete Case Notes	Primary Worker
			2010/01/22	Dormitory	05				
			2010/01/19	Dormitory	03				
			2010/01/18	Dormitory	49	2011/02/19 [y]			
			2012/04/19	Dormitory	11				
			2010/01/15	Dormitory	33	2011/01/31 [y]			
			2010/01/14	Dormitory	44	2011/02/15 [n]			
			2010/01/14	Dormitory	02	2011/07/04 [n]	2011/07/04	1	

2. Client Intake Report – All Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: All Program Users

Description:

The Program based report shows all new intakes with their most relevant information, created for a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Program profile and report parameter information. The Reporting Period can be set by the end user.

You can also filter this report for Clients who are assigned to any particular staff upon admission.

You can download this report to an excel document and then sort according to any of the columns. You can download to a PDF for a printable version.

Report Parameters:

Intake Date From	(report start date, default is 60 days prior to the current date)
Intake Date To	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

Report Header:

Client Intake Report

<i>This report provides the number of new intake in a specified period</i>
Reporting Period: 2012/02/06 – 2012/04/10 lists dates entered below

This is the facility information populated automatically			
Name	<i>Program name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Program phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds allowed in the Facility space that houses the Program</i>
Funding Capacity:	<i>Max. # of funded beds based upon Program Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Intake Date From	2012/02/06	Intake Date To	2012/04/10	<input type="text" value="Search"/>
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Total clients	<i>Total number of clients</i>	Total Intakes	<i>Total number of new</i>
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	<i>intake within this period</i>		<i>intakes in this period</i>
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Report Detail (Fields):

FIELD NAME	DESCRIPTION
Name	Client lastname, firstname
DOB	Client's date of birth
Client No.	SMIS client number
Intake Status	Current intake status: <i>admitted, discharged, active, inactive</i>
Lived last 12 Mnths	Where client lived in the last 12 months: <i>Toronto, Elsewhere in Ontario, Indian Reserve, Another Province, Outside Canada, Unorganized Territories, Other</i>
Reason for Service	Reason the client request shelter service
Intake Date	Date of intake
Service End Date	End date of service – for Service programs Only
Rejection Date	Date intake was rejected
Rejection Reason	Reason intake was rejected
Relationship	Client's relationship to head of household: <i>Dependant, Spouse/Partner, left blank if Head of household or single</i>

Export Options: [Excel](#), [PDF](#)

Report Sample Screen:



Shelter - Client Intake Report - Windows Internet Explorer



toronto SMIS Shelter - Client Intake Report Print Close

Printed: 2012/10/26

Reporting Period: 2012/02/02 - 2012/05/01

Shelter:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Start Date: 2012/02/02  End Date: 2012/05/01  Search

 [Excel](#)  [PDF](#)

Program	Total Unique Clients	Total Intakes
Birkdale Residence - Bedded Program	8	9
Total	8	9

Program: Program Type:

Program	Name	DOB	Client No.	Intake Status	Lived Last 12 Mths	Reason for Service	Intake Date	Service End Date	Rejection Date	Rejection Reason	Relationship
Birkdale Residence - Bedded Program				admitted	Toronto		2012/04/03				Spouse/Partner
Birkdale Residence - Bedded Program				admitted	Toronto	Evicted by Family/Friends	2012/04/03				
Birkdale Residence - Bedded Program				admitted	Toronto	Unsafe Premises	2012/03/13				
Birkdale Residence - Bedded Program				discharged	Toronto		2012/03/13				
Birkdale Residence - Bedded Program				discharged	Toronto		2012/03/13				
Birkdale Residence - Bedded Program				discharged	Toronto	Foreclosure Due to Mortgage Payment Arrears	2012/03/13				
Birkdale Residence - Bedded Program				discharged	Toronto		2012/03/13				Dependent
Birkdale Residence - Bedded Program				discharged	Elsewhere in Ontario	Foreclosure Due to Mortgage Payment Arrears	2012/03/05				
Birkdale Residence - Bedded Program				discharged	Elsewhere in Ontario	Fire or other disaster	2012/03/05				

9 items found, displaying all items.

3. Client Occupancy Report – All Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: All Program Users

Description:

The Program based report shows all client admissions that has at least 1 stay day during a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Program profile and report parameter information. The Reporting Period can be set by the end user.

You can download this report to an excel document and then sort according to any of the columns
You can download to a PDF for a printable version

Report Parameters:

Start Date	(report start date, default is 60 days from current date)
End Date	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

You can download this report to an excel document and then sort according to any of the columns
You can download to a PDF for a printable version

Report Header:

Client Occupancy Report

<i>This report provides the total number of clients admitted in specified period (not unique)</i>
Reporting Period: 2012/02/06 – 2012/04/10 lists dates entered below

This is the facility information populated automatically			
Name	<i>Program name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Program phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds allowed in the Facility space that houses the Program</i>
Funding Capacity:	<i>Max. # of funded beds based upon Program Operating Agreement</i>	Male/Female	<i>Client group</i>

Minimum Age	0	Maximum Age	100
Intake Date From	2012/02/06	Intake Date To	2012/04/10
			Search Can go Back 90 Days
Total clients	<i>Total number of clients stayed within this period</i>	Total Bed Nights	<i>Total occupancy for reporting period – not related to specific clients</i>


Report Detail (Fields):

FIELD NAME	DESCRIPTION
Name	Client lastname, firstname
DOB	Client's date of birth
Client No.	SMIS client number
Room	Room number of the admission
Bed	Bed number of the admission – applicable for non-family programs Only
Occup. Status	Current occupancy status: <i>admitted, discharged</i>
Admission Date	Date the client was admitted
Discharge Date	Date the client was discharged
Discharge Reason	Reason the client was discharged
Relationship	Client's relationship to head of household: <i>Dependant, Spouse/Partner, left blank if Head of household or single</i>
Bed Nights	Total bed nights stayed during the reporting date range

Export Options: [Excel](#), [PDF](#)

Report Sample Screen:

Client Occupancy Report - Windows Internet Explorer



Client Occupancy Report

Print Close

Printed: 2012/10/25

Reporting Period: 2012/09/11 - 2012/10/25

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Spec Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Start Date: 2012/09/11 End Date: 2012/10/25 Search

[Excel](#) [PDF](#)

Total Clients	12	Total Bed Nights	484
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Name	DOB	Client No.	Room	Bed	Occup. Status	Admission Date	Discharge Date	Discharge Reason	Relationship	Bed Nights
			412		admitted	2012/03/13				44
			412		admitted	2012/09/21			Dependent	34
			502		admitted	2012/08/17				44
			204		admitted	2011/11/01				44
			204		admitted	2011/11/01			Dependent	44
			602		admitted	2012/01/10				44
			602		admitted	2011/07/18				44
			602		admitted	2011/07/18				44
					discharged	2012/03/13	2012/09/21	Automatic discharge - Client admitted to another program		10
			702		admitted	2012/04/03				44
			702		admitted	2012/04/03			Spouse/Partner	44
			505		admitted	2012/10/03				22
			505		admitted	2012/10/03			Dependent	22

13 items found, displaying all items.

4. Client Discharge Report – All Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: All Program Users

Description:

The Program based report shows all client discharges during a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Program profile and report parameter information. The Reporting Period can be set by the end user.

You can download this report to an excel document and then sort according to any of the columns

You can download to a PDF for a printable version

Report Parameters:

Start Date	(report start date, default is 60 days from current date)
End Date	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

Report Header:

Client Discharge Report

<i>This report provides the number of discharges in a specified period</i>
Reporting Period: 2012/02/06 – 2012/04/10 lists dates entered below

This is the facility information populated automatically			
Name	<i>Program name – Bedded program</i>	Facility	<i>Program Name</i>
Description	<i>Client group described</i>	Phone	<i>Program phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds allowed in the Facility space that houses the Program</i>
Funding Capacity:	<i>Max. # of funded beds based upon Program Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Intake Date From	2012/02/06	Intake Date To	2012/04/10	<input type="text" value="Search"/>
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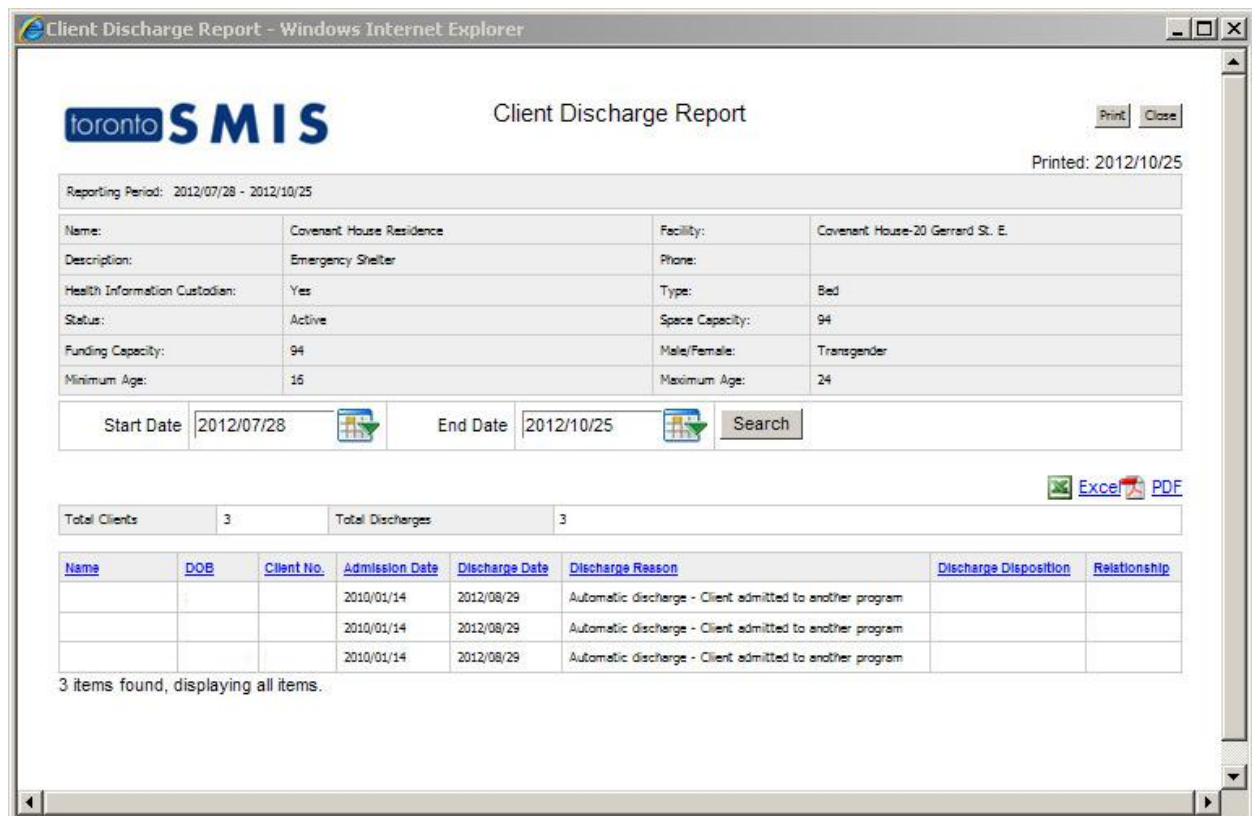
Total clients	<i>Total number of clients listed within this period</i>	Total Discharges	<i>Total number of discharges in this period, not related to unique clients</i>
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Report Detail (Fields):

FIELD NAME	DESCRIPTION
Name	Client lastname, firstname
DOB	Client's date of birth
Client No.	SMIS client number
Admission Date	Date the client was admitted
Discharge Date	Date the client was discharged
Discharge Reason	Reason the client was discharged
Discharge Disposition	Where the client was discharge to
Relationship	Client's relationship to head of household: <i>Dependant, Spouse/Partner, left blank if Head of household or single</i>

Export Options: [Excel](#), [PDF](#)

Report Sample Screen:



Client Discharge Report - Windows Internet Explorer

Client Discharge Report Print Close

Reporting Period: 2012/07/28 - 2012/10/25 Printed: 2012/10/25

Name:	Covenant House Residence	Facility:	Covenant House-20 Gerrard St. E.
Description:	Emergency Shelter	Phone:	
Health Information Custodian:	Yes	Type:	Bed
Status:	Active	Space Capacity:	94
Funding Capacity:	94	Male/Female:	Transgender
Minimum Age:	16	Maximum Age:	24

Start Date: 2012/07/28 End Date: 2012/10/25 Search

[Excel](#) [PDF](#)

Total Clients	3	Total Discharges	3
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Name	DOB	Client No.	Admission Date	Discharge Date	Discharge Reason	Discharge Disposition	Relationship
			2010/01/14	2012/08/29	Automatic discharge - Client admitted to another program		
			2010/01/14	2012/08/29	Automatic discharge - Client admitted to another program		
			2010/01/14	2012/08/29	Automatic discharge - Client admitted to another program		

3 items found, displaying all items.

5. (Program) Occupancy Report – All Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: All Program Users

Description:

The Program based report shows daily aggregate statistics occupancies for a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Program profile and report parameter information. The Reporting Period can be set by the end user. The report details the occupancy stats one day per row in the tabular format.

Note that all statistics are based upon the 4 a.m. official reporting time for the business day before. (For example, Feb 4 business day stats are based upon the counts as of 4 a.m. on Feb 5, which is after the 2 formal bed checks have been completed and SMIS is updated accordingly which usually takes place between midnight and prior to 4 a.m.)

Report Parameters:

Start Date	(report start date, default is 60 days from current date)
End Date	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

You can download this report to an excel document and then sort according to any of the columns
You can download to a PDF for a printable version

Report Header:

Program Occupancy Report

Reporting Period: 2012/02/1 – 2012/04/10	<i>From dates entered below</i>
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This is the facility information populated automatically			
Name	<i>Program name – Bedded program</i>	Facility	<i>Program Name</i>
Description	<i>Client group described</i>	Phone	<i>Program phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds allowed in the Facility space that houses the Program</i>
Funding Capacity:	<i>Max. # of funded beds based upon Program Operating Agreement</i>	Male/Female	<i>Client group</i>

Minimum Age	0	Maximum Age	100
Date From	2012/02/06	Date To	2012/04/10
Search can go back 90 days			

Report Detail (Fields):

Summary Block:

FIELD NAME	DESCRIPTION
Queue	Current queue size
Occupancy	Current occupancy
Average Occupancy	Average daily occupancy over the reporting period
Vacancy	Current vacancy
Average Vacancy	Average daily vacancy over the reporting period
Actual Capacity	Current actual capacity
Average Capacity	Average daily actual capacity over the reporting period
Funding Capacity	Current funding capacity


Detailed Block:

FIELD NAME	DESCRIPTION
Date	A date within the reporting date range
Queue	Queue @ 4am next day
Occupancy	Occupancy @ 4am next day
Vacancy	Occupancy @ 4am next day
Actual Capacity	Actual capacity of program @ 4am next day
Funding Capacity	Funding capacity of program

Export Options: [Excel](#), [PDF](#)

Report Sample Screen:

Client Report - Windows Internet Explorer





Program Occupancy Report
 [Print](#)
[Close](#)

Printed: 2012/10/25

Reporting Period: 2012/09/25 - 2012/10/24

Name:	Covenant House Residence	Facility:	Covenant House-20 Gerrard St. E.
Description:	Emergency Shelter	Phone:	
Health Information Custodian:	Yes	Type:	Bed
Status:	Active	Space Capacity:	94
Funding Capacity:	94	Male/Female:	Transgender
Minimum Age:	16	Maximum Age:	24

Date From: 2012/09/25 
 Date To: 2012/10/24 
[Search](#)

[Excel](#)
[PDF](#)

Queue	Occupancy	Average Occupancy	Vacancy	Average Vacancy	Actual Capacity	Average Capacity	Funding Capacity
2	76	76	18	18	94	94	94

Date	Queue	Occupancy	Vacancy	Actual Capacity	Funding Capacity
2012/09/25	2	76	18	94	94
2012/09/26	2	76	18	94	94
2012/09/27	2	76	18	94	94
2012/09/28	2	76	18	94	94
2012/09/29	2	76	18	94	94
2012/09/30	2	76	18	94	94
2012/10/01	2	76	18	94	94
2012/10/02	2	76	18	94	94
2012/10/03	2	76	18	94	94
2012/10/04	2	76	18	94	94
2012/10/05	2	76	18	94	94
2012/10/06	2	76	18	94	94
2012/10/07	2	76	18	94	94
2012/10/08	2	76	18	94	94
2012/10/09	2	76	18	94	94
2012/10/10	2	76	18	94	94
2012/10/11	2	76	18	94	94
2012/10/12	2	76	18	94	94
2012/10/13	2	76	18	94	94
2012/10/14	2	76	18	94	94
2012/10/15	2	76	18	94	94
2012/10/16	2	76	18	94	94
2012/10/17	2	76	18	94	94
2012/10/18	2	76	18	94	94
2012/10/19	2	76	18	94	94
2012/10/20	2	76	18	94	94
2012/10/21	2	76	18	94	94
2012/10/22	2	76	18	94	94
2012/10/23	2	76	18	94	94
2012/10/24	2	76	18	94	94
Average:	2	76	18	94	94

31 items found, displaying all items.

6. Service Restriction Report – All Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: All Program Users who can view or update Service Restrictions

Description:

The Program based report shows all service restrictions active at any time within a specified date range based upon the restriction's start and potential end date. The default restriction start dates has a range of the last 60 calendar days (as a default setting but can be overwritten by the user). The default restriction end dates has a range of the last 60 calendar days also (as a default setting but can also be changed by the user). There is no maximum reporting date ranges size setting here. The beginning of the report also displays Program profile and report parameter information.

You can download this report to an excel document and then sort according to any of the columns
You can download to a PDF for a printable version

Report Parameters:

Start Date From	(the earliest date of the start date of the service restrictions to report, default is 60 days before the current date)
Start Date To	(the latest date of the start date of the service restrictions to report, default is today)
End Date From	(the earliest date of the end date of the service restrictions to report, default is 60 days prior to today)
End Date To	(the latest date of the potential end date of the service restrictions to report, default is today)
Status	(current status of the service restriction: <i>in progress, completed, terminated early, blank meaning to show all</i>)

There are NO Maximum Reporting Date Range limits in this report.

Report Header:

Service Restriction Report

This report indicates each service restriction recorded within the range identified.

Reporting Period: 2012/02/1 – 2012/04/10	<i>From dates entered below</i>
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This is the facility information populated automatically			
Name	<i>Program name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Program phone number</i>

Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds allowed in the Facility space that houses the Program</i>
Funding Capacity:	<i>Max. # of funded beds based upon Program Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Start Date From	2012/02/11	End Date From	2012/04/10	Status <i>current status of the service restriction: in progress, completed, terminated early, of left blank to select all records</i>
To	2012/04/10	To	2012/04/10	Search
	Identifies range of service restriction start dates		Identifies range of service restriction end dates	


Report Detail (Fields):

FIELD NAME	DESCRIPTION
Client ID	SMIS client identifier
Client Name	Lastname, firstname of client
Restriction Reason	Reason for the service restriction
Date	The start date of the service restriction
Duration (DAYS)	The original duration of the service restriction
Status	Current status of the service restriction: <i>in progress, completed, terminated early</i>
Early Termination By	Date of early termination of service restriction if applied

Export Options: [Excel](#), [PDF](#)

Report Sample Screen:

Service Restriction Report - Windows Internet Explorer



Service Restriction Report

Print Close

Printed: 2012/10/25

Restriction Start Date: 2012/03/08 - 2012/05/01, Restriction End Date: 2012/03/08 - 2012/05/01, Status:

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Start Date From	2012/03/08	End Date From	2012/03/08	Status	
To	2012/05/01	To	2012/05/01	Search	

[Excel](#)
[PDF](#)

Client ID	Client Name	Restriction Reason	Date	Duration (DAYS)	Status	Early Termination By
		Assault of residents, volunteers or staff	2012/04/04 04:01:30 PM	15	completed	.
		Disruptive behaviour	2012/04/04 04:01:52 PM	6	completed	.

2 items found, displaying all items.

7. PNA To Be Paid Report – All Programs

Report Category: Program

Access Via: Program Navigator - Financial

User Access Group: All Program Users who has access to SMIS Financials

Description:

The Program based report shows the current PNA liability of the Program. It lists the entire amount owing to clients who have been deemed PNA eligible by staff and have not collected the listed PNA amounts from the last 37 calendar days prior to today. Note that any PNA amounts owing older than 37 days are not included in this report since they are no longer eligible to be given out. The beginning of the report also displays Program profile information.

You can download this report to an excel document and then sort according to any of the columns
You can download to a PDF for a printable version

Report Parameters:

None

Report Header:

PNA To Be Paid Report

This report provides the list of all clients whose eligibility has been checked, and they have stayed at the shelter and therefore PNA is owed to them. The clients on this may not currently be staying at the shelter, but they have PNA owed to them from the period identified in the report

Reporting Period: 2012/04/10		<i>Registers the date the report is run</i>	
This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds allowed in the Facility space that houses the Program</i>
Funding Capacity:	<i>Max. # of funded beds based upon Program Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Report Detail (Fields):

Summary Block

FIELD NAME	DESCRIPTION
Total Clients	Total number of clients owing PNA to
Total Bed Nights	Total number of bed nights of PNA owing to all eligible clients that have not been collected within the last 37 days
Total Balance	The current total amount or liability of PNA owing


Detailed Table

FIELD NAME	DESCRIPTION
Client No.	SMIS client number
Last Name	lastname of client
First Name	firstname of client
Last Admission Date	The latest admission date of the client)
Bed Night	Total number of bed night of PNA owing to the client
Balance	(total \$ amount of PNA owing to the client
Discharged	shows whether the client is discharged or not: <i>discharged, active</i>

Export Options: [Excel](#), [PDF](#)

Report Sample Screen:

PNA To Be Paid Report - Windows Internet Explorer



PNA To Be Paid Report

Print Close

Printed: 2012/10/25

Reporting Period: 2012/10/25

Name:	Seaton House - Hostel Program	Facility:	Seaton House - 339 George Street
Description:	250 Bed Emergency Shelter (capacity for 50 emergency cots) total 300 beds for single men	Phone:	
Health Information Custodian:	Yes	Type:	Bed
Status:	Active	Space Capacity:	300
Funding Capacity:	300	Male/Female:	Male
Minimum Age:	16	Maximum Age:	100

Total Client	2
Total Bed Night	14
Total Balance	\$60.20

[Excel](#)
[PDF](#)

Client No.	Last Name	First Name	Last Admission Date	Bed Night	Balance	Discharged
			2012/08/29	7	\$30.10	Active
			2012/08/27	7	\$30.10	Active

2 items found, displaying all items.

8. Client Safekeeping Balances Report – All Programs

Report Category: Program

Access Via: Program Navigator - Financial

User Access Group: All Program Users who has access to SMIS Financials

Description:

The Program based report shows the current Client Safekeeping Funds (CSF) liability of the Program as of a specified date (defaulted to today but can be changed by the user). It lists the entire amount owing to clients who have balances of \$ safekeeping funds with the Program as of the specified date. The beginning of the report also displays Program profile information.

You can download this report to an excel document and then sort according to any of the columns

You can download to a PDF for a printable version

Report Parameters:

End Date	(the reporting date at which the CSF liability is calculated)
----------	---

Report Header:

Client Safekeeping Balances Report

Reporting Period: 2012/04/10	<i>Registers the date the report is run</i>
-------------------------------------	---

End Date	2012/04/10 <input type="text" value="search"/>	<i>Enter the date you want to report to, and this will include all client safekeeping balances held as of that date</i>
----------	--	---

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds allowed in the Facility space that houses the Program</i>
Funding Capacity:	<i>Max. # of funded beds based upon Program Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Report Detail (Fields):

Summary Block

FIELD NAME	DESCRIPTION
Total Clients	Total number of clients owing CSF to
Total Balance	The current total amount – liability – of CSF owing

Detailed Table

FIELD NAME	DESCRIPTION
Client No.	SMIS client number
Last Name	Lastname of client
First Name	Firstname of client
First Trans Date	Date of the first transaction done for the client depending upon the specified End Date parameter
Last Trans Date	Date of the latest transaction done for the client depending upon the specified End Date parameter
Balance	
Currently Active	Shows whether the client is currently active in the program of not: Yes, No

Export Options: [Excel](#), [PDF](#)

Report Sample Screen:

Client Safekeeping Balance Report - Windows Internet Explorer

Client Safekeeping Balance Report Print Close

Printed: 2012/10/25

Reporting Period: 2012/10/25

End Date: 2012/10/25 Search

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Total Client	11
Total Balance	\$108,755.75

[Excel](#) [PDF](#)

Client No.	Last Name	First Name	First Trans Date	Last Trans Date	Balance	Currently Active
			2012/04/10	2012/04/10	\$150.00	Yes
			2011/05/17	2011/10/18	\$85.00	No
			2011/01/14	2011/09/06	\$100,070.89	No
			2011/02/18	2011/09/06	\$87.00	No
			2011/06/02	2011/07/18	\$35.00	No
			2011/02/18	2011/07/07	\$78.00	No
			2011/07/05	2011/07/14	\$106.20	No
			2011/07/05	2011/07/14	\$135.36	No
			2012/04/10	2012/04/10	\$50.00	Yes
			2011/01/18	2011/01/18	\$775.00	No
			2011/01/19	2011/07/28	\$7,183.30	No

11 items found, displaying all items.

9. Exception Report – All Programs

Report Category: Program

Access Via: Program Navigator - Financial

User Access Group: Supervisor & Manager Roles

Description:

The Program based report shows all the financial related exceptions for the Program as of a specified date range. The default range is of the last 60 days and can be globally changed. There is no maximum size to the date range. It lists all the transaction reversals, allowance override thru the Give Allowance advance function, and Client Safekeeping Funds balances greater than a designated threshold amount (currently set to \$2000) as of the reporting End Date. The beginning of the report also displays Program profile information.

You can download this report to an excel document and then sort according to any of the columns
You can download to a PDF for a printable version

Report Parameters:

Start Date (the reporting start date)
End Date (the reporting to date)

Report Header:

Exception Report

Reporting Period: <i>according to dates entered below</i>

Name	<i>Program name</i>	Facility	<i>Facility name</i>
Description:	<i>Program description</i>	Phone	<i>Phone number of the program</i>
Health Information Custodian	<i>No</i>	Type	<i>Type of program</i>
Status	<i>Current status of the Program</i>	Space Capacity	<i>Total # of beds allowed in the Facility space that houses the Program</i>
Funding Capacity	<i>Max. # of funded beds based upon Program Operating Agreement</i>	Male/Female	<i>Gender(s) of the shelter program</i>
Minimum Age	<i>Lower age limit of the program</i>	Maximum Age	<i>Upper age limit of the program</i>

Start Date	<i>Reporting period begin date</i>	End Date	<i>Reporting Period End Date</i>	<input type="text" value="Search"/>
------------	--	----------	--------------------------------------	-------------------------------------

Report Detail (Fields):


FIELD NAME	DESCRIPTION
Date	Date and time of the financial transaction)
ID	Transaction ID
Type	Transaction type: <i>Reverse, Allowance Override, CSF</i>
Detail	(detail of the transaction incl. give allowance reasons for PNA or FA, corresponding reversed transaction ID
Amount	The amount of the transaction
User Name	The user who created the transaction
Client ID	SMIS client ID
Client Name	Lastname and firstname of client
Note	Note created during and regarding the transaction

Print Options: Report Print action button

Export Options: [Excel](#), [PDF](#)

Report Sample Screen:

Exception Report - Windows Internet Explorer



Exception Report

Print Close

Printed: 2012/10/25

Reporting Period: 2011/01/01 - 2012/05/01

Name:	Cornerstone Place	Facility:	Cornerstone Place 833 St.Clair W
Description:	Provide Shelter for 50 Men, 25 years and over	Phone:	
Health Information Custodian:	Yes	Type:	Bed
Status:	Active	Space Capacity:	52
Funding Capacity:	50	Male/Female:	Male
Minimum Age:	25	Maximum Age:	78

Start Date: 2011/01/01 End Date: 2012/05/01 Search

Excel PDF

Date	ID	Type	Detail	Amount	User Name	Client ID	Client Name	Note
2011/01/19 10:58:14 AM		Reverse	Original TxID : Created 2011/01/19 10:57:46 AM	-\$50.00				test
2011/02/25 03:08:47 PM		Reverse	Original TxID : Created 2011/02/25 03:08:09 PM	-\$25.80				test
2011/07/07 02:05:36 PM		Allowance Override	Reason : PNA Reason 2	\$12.90				PNA for July 1 to July 4, 2011.
2011/07/07 02:06:54 PM		Allowance Override	Reason : PNA Reason 2	\$100.00				test
2011/07/07 02:11:14 PM		Allowance Override	Reason : PNA Reason 1	\$55.00				test
2011/07/18 09:30:54 AM		Reverse	Original TxID : Created 2011/07/18 09:29:43 AM	-\$43.00				test
2011/09/06 11:25:14 AM		Allowance Override	Reason : PNA Reason 1	\$99.99				test
2011/09/06 11:25:52 AM		Allowance Override	Reason : PNA Reason 3	\$2.32				test2
2011/09/06 11:33:21 AM		Allowance Override	Reason : PNA Reason 2	\$9.00				test
2011/09/06 11:39:10 AM		Allowance Override	Reason : PNA Reason 2	\$100.00				test
		CSF	Greater than Threshold	\$2,002.00				

11 items found, displaying all items.

10. Eligibility Report – All Programs

Report Category: Program

Access Via: Program Navigator - Financial

User Access Group: All Program Users who has access to SMIS Financials

Description:

The Program based report shows the list of clients who has stayed at least 1 day in the last 14 days, and is missing an eligibility assessment record that covers that day(s). This means SMIS does not know if the client will be eligible for PNA or not for the missing eligibility. The reason 14 days is used is because a user can only create an eligibility assessment record going back 14 days. The beginning of the report also displays Program profile information.

You can download this report to an excel document and then sort according to any of the columns
You can download to a PDF for a printable version

Report Parameters:

None

Report Header:

Eligibility Report

This report indicates each service restriction recorded within the range identified.

Reporting Period: 2012/04/10

Enters the date the report is run

This is the facility information populated automatically

Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds allowed in the Facility space that houses the Program</i>
Funding Capacity:	<i>Max. # of funded beds based upon Program Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Report Detail (Fields):

FIELD NAME	DESCRIPTION
Client Id	SMIS client number
Client Name	Lastname and firstname of client
Admission Status	The current admission status of the client
Admission Date	The latest admission date of the client
Discharge Date	The latest discharge date of the client
Primary Worker Name	The name of the primary worker assigned to the client via the Admissions screen

Export Options: [Excel](#), [PDF](#)


11. (Single) Complaint Detail Report– All Programs

Report Category: Client

Access Via: Client Navigator

User Access Group: All Program Users who has access to view or update Complaints

Description:

The Client based report shows complete detail of a single Complaint record relating to a Client. This report can be access via the Client Complaints Screen's new Print action button.

Report Parameters:

None

Report Detail (Fields):

All fields on the Client Management - Complaints (input) screen.

Save Options: PDF (*See Sample Screen below*)

Report Sample Screen:

https://was-intra-qa.toronto.ca/SMIS/PMmodule/QuatroComplaint.do?complaintId=12131&method=print - Windows 1...

1 / 1 74.4% Find

toronto SMIS **Complaint Detail** printed on 2012-10-25 10:42 AM
printed by

Client No.		Name	
DOB		Age	42
Complaint ID			
Complainant			
Source	Client	Method of Contact	In-Person
First Name		Last Name	
Program	Birkdale Residence - Bedded Program		
Complaint Details			
Is complaint related to Toronto Shelter Standards ?			Yes
6. Program Standards			
6.4 Services to Children			
6.6 Confidentiality			
Description of Complaint/Narrative			
testing testing testing			
Outcome			
Was the complainant satisfied with the outcome ?			Not Applicable
Was Toronto Shelter Standards breached ?			No
Service System Issues	fsdafasd dsf asdfsdfasdfsdf sfasd f		
Complaint Status	Completed	Time Spent on Complaint	20 Minutes
Date Completed	2011/10/13		
Record Reviewed by (Person 1)		Record Reviewed by (Person 2)	
Job Title	Supervisor	Job Title	Mgr
Date Reviewed	2011/10/13	Date Reviewed	2011/10/13


12. (Single) Incident Detail Report– All Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: All Program Users who has access to view or update Incidents

Description:

The Program based report shows complete detail of an Incident record. This report can be access via the Program Incidents Screen's new  Print action button.

Report Parameters:

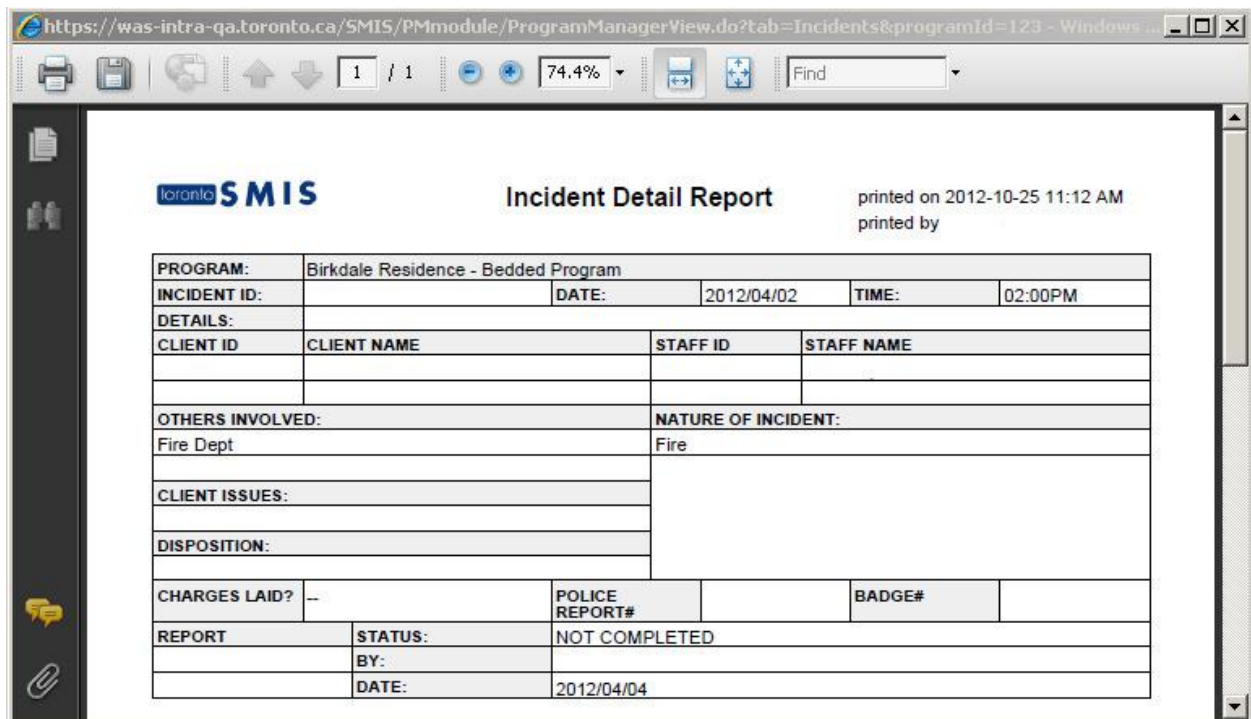
None

Report Detail (Fields):

All fields on the Program Management incident screen.

Save Options: PDF (See Sample Screen below)

Report Sample Screen:



PROGRAM:		Birkdale Residence - Bedded Program			
INCIDENT ID:		DATE:	2012/04/02	TIME:	02:00PM
DETAILS:					
CLIENT ID	CLIENT NAME	STAFF ID	STAFF NAME		
OTHERS INVOLVED:			NATURE OF INCIDENT:		
Fire Dept			Fire		
CLIENT ISSUES:					
DISPOSITION:					
CHARGES LAID?	---	POLICE REPORT#		BADGE#	
REPORT	STATUS:	NOT COMPLETED			
	BY:				
	DATE:	2012/04/04			

13. Program Dashboard Screen – Bed Program

Report Category: Program

Access Via: Program Navigator

User Access Group: All Program Users

Description:

The Program based dashboard like screen shows **real-time** Occupancy, Bed Nights, Incidents, Service Restrictions, Complaints and Case Notes aggregate statistics for any Bed Program.

Note that all Occupancy stats, unless stated as “current” otherwise, are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4 a.m. and update any occupancy changes timely into SMIS.

Report Parameters:

None

Report Detail (Fields):

See Report Layout below for more details...

Report Layout:

Program Dashboard

This report is accessed through the left side Navigator and provides real-time occupancy information. The Reports icon at the top right will soon be deleted and all reports will be accessed through the Program icon.

Occupancy			
Active intakes without admission	<i>This number represents all the active intakes that were entered at your shelter program. (Note that All intake that have been entered remains for 18 hours or more, that are not admitted to your shelter program, will expire at midnight each night.)</i>	Vacancy	<i>This number represents funded capacity less the active admissions or occupancy of your program and cannot be negative.</i>
Referrals from other programs	<i>Total number of referrals from external</i>	Vacancy rate	<i>Vacancy divided by funded capacity</i>

	<i>programs that are currently still active</i>		
Queue	<i>This number includes external referrals as well as internal intake. (Note that All intake that have been entered remains for 18 hours or more, that are not admitted to your shelter, will expire at midnight each night.)</i>	Current capacity	<i>The number represents active beds available in your shelter. This will not include any beds you have made unavailable, e.g. bed bugs, maintenance, etc. This number will be less than or equal to your space capacity</i>
Occupancy (active admissions)	<i>This number represents currently occupied beds</i>	Funded capacity	<i>As per Operating Agreement</i>
Occupancy rate	<i>100% minus the Vacancy Rate</i>		

Bed Nights			
Yesterday	<i>Number of beds occupied as of 4:00 a.m. this morning represents the bed nights for yesterday's business day</i>	Past 30 Days	<i>All occupied beds for the past 30 days up to yesterday (4:00 a.m. this morning)</i>
Current Month	<i>Includes the number of all occupied beds for the current month, up to 4:00 a.m. this morning</i>	Previous Month	<i>All occupied beds in the previous calendar month</i>

Incidents	
New incidents past 30 days	<i>These numbers include all incidents occurred up till 4:00am this morning for the past 30 days</i>
New incidents this calendar month	<i>All incidents newly occurred this month up till 4:00am this morning.</i>
Open incidents	<i>This number represents all incidents that have not been concluded or closed regardless when they were entered or have occurred.</i>

Service Restrictions
<p><i>This report section does not provide aggregate numbers. One restriction may be represented in more than one category. The duration will be recorded as the original duration applied at the time of recording the incidents. All incidents recorded up to 4:00 a.m. this morning will be included.</i></p> <p><i>You must notify and discuss all lengthy service restrictions with your Agency Review Officer at Hostel Services</i></p>

Original duration of restriction (in days)	1-7	8-14	15-30	31-60	61-90	91-180	180+
New restrictions past 30 days							
New restrictions this calendar month							
Currently active							
Terminated early past 30 days							
Expired past 30 days							

Complaints			
<i>This report section ONLY includes complaints made at the shelter program, it does NOT include complaints made relating to the shelter program at head office or at any other shelter program. All complaints recorded up to 4:00 a.m. this morning will be included.</i>			
New Complaints Past 30 Days			
New Complaints This Calendar Month			
Open Complaints (<30 Days Old)			
Open Complaints (30-60 Days Old)			
Open Complaints (>60 Days Old)			

Case Notes			
<i>This report section includes all case notes made at this shelter program. All notes recorded up to 4:00 a.m. this morning will be included.</i>			
New Notes Past 30 Days			
New Notes This Calendar Month			
Incomplete Notes (<30 Days Old)			
Incomplete Notes (30-60 Days Old)			
Incomplete Notes (>60 Days Old)			

Print Options: Browser Print

Report Sample Screen:

Shelter:

User: Lee, Ben

[Home](#) [My Tasks](#) [Reports](#) [Help](#) [Logout](#)
[Client](#) [Program](#) [Facility](#) [Administration](#)

Navigator

- Covenant House Residence(11951)
 - General
 - Queue
 - Clients
 - Incidents
 - Service Restrictions
 - Complaints
 - Staff
 - Dashboard**
 - Statistics
 - Occupancy
 - Occupancy - Unique Clients
 - Client Services
 - Client Services - Unique Clients
 - Discharge
 - Discharge - Unique Clients
 - Reports
 - Client Report
 - Client Intake Report
 - Client Discharge Report
 - Occupancy Report
 - Service Restriction Report
 - [+] Financial

Program Dashboard - Covenant House Residence

[Back to Programs](#)

Occupancy

Active Intakes without Admission	0	Vacancy	9
Referrals from Other Programs	2	Vacancy Rate	9.57%
Queue	2	Current Capacity	94
Occupancy(Active Admissions)	85	Funded Capacity	94
Occupancy Rate	90.43%		

Bed Nights

Yesterday	85	Past 30 Days	2550
Current Month	2040	Previous Month	2550

Incidents

New Incidents Past 30 Days	0		
New Incidents This Calendar Month	0		
Open Incidents	0		

Service Restrictions

Original Duration of Restriction (in Days)	1 - 7	8 - 14	15 - 30	31 - 60	61 - 90	91 - 180	>180
New Restrictions Past 30 Days	1	0	0	1	3	1	0
New Restrictions This Calendar Month	1	0	0	1	3	1	0
Currently Active	0	0	0	1	3	1	0
Terminated Early Past 30 Days	1	0	0	0	0	0	0
Expired Past 30 Days	0	0	0	0	0	0	0
Expired Next 30 Days	0	0	0	0	0	0	0

Complaints

New Complaints Past 30 Days	0		
New Complaints This Calendar Month	0		
Open Complaints (<30 Days Old)	0		
Open Complaints (30 - 60 Days Old)	0		
Open Complaints (>60 Days Old)	0		

Case Notes

New Notes Past 30 Days	0		
New Notes This Calendar Month	0		
Incomplete Notes (<30 Days Old)	0		
Incomplete Notes (30 - 60 Days Old)	0		
Incomplete Notes (>60 Days Old)	2		

14. Program Dashboard Screen – Service Program

Report Category: Program

Access Via: Program Navigator

User Access Group: All Program Users

Description:

The Program based dashboard like screen shows **real-time** Intakes, Incidents, Service Restrictions, Complaints and Case Notes aggregate statistics for any Service Program. Note that for Service Programs, Admissions, Occupancy, Vacancy and Capacity statistics are not applicable and hence omitted for the Dashboard. Only Active Intakes, Referrals from Other Programs and Queue are included in the Occupancy section of the Dashboard.

Report Parameters:


None

Report Detail (Fields):

See above under **Program Dashboard Screen – Bed Program** for similar field descriptions and layout with the noted Occupancy section fields omitted as per Description above.

Print Options: Browser Print

Report Sample Screen:



Shelter: Home My Tasks Reports Administration Help Logout
 User: Lee, Ben Client Program Facility Shelter Head Office

Navigator

- Women's Residence - Housing and Outreach Program(11991)
 - General
 - Queue
 - Clients
 - Incidents
 - Service Restrictions
 - Complaints
 - Staff
 - Dashboard**
 - Statistics
 - Occupancy
 - Occupancy - Unique Clients
 - Client Services
 - Client Services - Unique Clients
 - Discharge
 - Discharge - Unique Clients
 - Reports
 - Client Report
 - Client Intake Report
 - Client Occupancy Report
 - Client Discharge Report
 - Occupancy Report
 - Service Restriction Report
 - [+] Financial

Program Dashboard - Women's Residence - Housing and Outreach Program

[Back to Programs](#)

Occupancy

Active Intakes	115		
Referrals from Other Programs	2		
Queue	2		

Incidents

New Incidents Past 30 Days	0		
New Incidents This Calendar Month	0		
Open Incidents	0		

Service Restrictions

Original Duration of Restriction (in Days)	1 - 7	8 - 14	15 - 30	31 - 60	61 - 90	91 - 180	>180
New Restrictions Past 30 Days	0	0	0	0	0	0	0
New Restrictions This Calendar Month	0	0	0	0	0	0	0
Currently Active	0	0	0	0	0	0	0
Terminated Early Past 30 Days	0	0	0	0	0	0	0
Expired Past 30 Days	0	0	0	0	0	0	0
Expired Next 30 Days	0	0	0	0	0	0	0

Complaints

New Complaints Past 30 Days	0		
New Complaints This Calendar Month	0		
Open Complaints (<30 Days Old)	0		
Open Complaints (30 - 60 Days Old)	0		
Open Complaints (>60 Days Old)	0		

Case Notes

New Notes Past 30 Days	0		
New Notes This Calendar Month	0		
Incomplete Notes (<30 Days Old)	0		
Incomplete Notes (30 - 60 Days Old)	0		
Incomplete Notes (>60 Days Old)	170		

15. Program Occupancy Screen – All Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: Supervisor & Manager roles

Description:

The Program based Occupancy screen shows statistics for new intakes, new admissions, discharges, accepted and rejected referrals to and from other Programs, any stays . = 1 day and total bed nights for the Program. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Intake, Admission, Discharge, Referral and Stay is counted as 1 occurrence regardless of the number of family members present at the time of the action. The only exception is the Bed Nights row, for which each family member contributes to the count.

(Note that all Occupancy stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4.a.m. and update any occupancy changes timely into SMIS.)

All Stays are based upon the 4 a.m. threshold and are counted only if the client stays pass this time. However, Admissions stats does not require the client to stay pass the 4 a.m. threshold. For example, if a client is admitted at 11 p.m. and is discharged few hours later at 1 a.m., the new Intake, Admission and Discharge stats will increase its count by 1 respectively, but NOT the Stays count since the client did not stay passed the 4 a.m. threshold.

Report Parameters:

None

Report Detail (Fields):

Intakes	(number of new intakes within the column date range)
Admissions	(number of new admissions within the column date range)
Discharges	(number of discharges within the column date range)
Accepted Referrals From Other Programs	(number of accepted referrals from other Programs within the column date range)
Rejected Referrals From Other Programs	(number of rejected referrals from other Programs within the column date range)
Accepted Referrals To Other Programs	(number of accepted referrals to other Programs within the column date range)
Rejected Referrals To Other Programs	(number of rejected referrals to other Programs within the column date range)
Stays (>=1 day)	(number of client stays >= 1 day within the column date range, note that this would include clients who were already staying in the Program at the beginning of the date range meaning they were admitted prior to the start date of the date range)

Bed Nights	(number of total bed nights of all clients within the column date range)
------------	--

Report Layout:

Statistics – Program Name – Bedded Program

Should be run on the 1st of the month


Occupancy	As of 4:00 a.m. today = Yesterdays statistics									
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	description
Intakes										New intakes entered within these date(s)
Admissions										New admissions within these date(s)
Discharges										New discharges within these date(s)
Accepted Referrals From Other Programs										Accepted from the queue and referred from another program within these date(s)
Rejected Referrals From Other Programs										Rejected from the queue from another program within these date(s)
Accepted Referrals To Other Programs										Referrals to other programs that were accepted.

										<i>Could be a service (non-bedded) program</i>
Rejected Referrals To Other Programs										<i>Referrals to other programs that were rejected. Could be a service (non-bedded) program</i>
Stays (>=1 day)										<i>Includes all Family or single client stays who stayed at least 1 day after admission into the program</i>
Bednights										<i># of individuals bed nights</i>

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



Shelter:
User: Lee, Ben

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esting....

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Statistics - Birkdale Residence - Bedded Program
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Occupancy

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Intakes	0	0	0	1	1	0	6	7	31
Admissions	0	0	0	1	1	0	6	7	29
Discharges	0	1	1	0	1	1	3	4	32
Accepted Referrals From Other Programs	0	0	0	0	0	0	0	0	1
Rejected Referrals From Other Programs	0	0	0	0	0	0	0	0	0
Accepted Referrals To Other Programs	0	0	0	0	0	0	0	0	0
Rejected Referrals To Other Programs	0	0	0	0	0	0	0	0	1
Stays (>= 1day)	6	0	6	6	6	6	5	6	11
Bed Nights	12	0	295	356	356	865	549	905	3224

16. Program Occupancy – Unique Clients Screen – All Program

Report Category: Program

Access Via: Program Navigator

User Access Group: Supervisor & Manager roles

Description:

The Program based Occupancy screen shows statistics for total number of unique clients with new intakes, new admissions, discharges, accepted and rejected referrals to and from other Programs and any stays ≥ 1 for the Program for the various date ranges. For example, if a client has 2 "new" intakes during the column date range period, then it is counted as 1 unique client intake only. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family*, each Intake, Admission, Discharge, Referral and Stay, each unique family member is counted individually when present at the time of the action. However, if a family member is part of two different family intakes, admission or other actions during 1 single reporting date range, then he/she is counted as 1 unique individual on this screen.

(Note that all Occupancy stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4.a.m. and update any occupancy changes timely into SMIS.)

All Stays are based upon the 4 a.m. threshold and are counted only if the client stays pass this time. However, Admissions stats does not require the client to stay pass the 4 a.m. threshold. For example, if a client is admitted at 11 p.m. and is discharged few hours later at 1 a.m., the new Intake, Admission and Discharge stats will increase its count by 1 respectively, but NOT the Stays count since the client did not stay passed the 4 a.m. threshold.

Report Parameters:

None

Report Detail (Fields):

Intakes	(number of unique clients with new intakes within the column date range)
Admissions	(number of unique clients with new admissions within the column date range)
Discharges	(number of unique clients with discharges within the column date range)
Accepted Referrals From Other Programs	(number of accepted referrals of unique clients from other Programs within the column date range)
Rejected Referrals From Other Programs	(number of rejected referrals of unique clients from other Programs within the column date range)
Accepted Referrals To Other Programs	(number of accepted referrals of unique clients to other Programs within the column date range)

Rejected Referrals To Other Programs	(number of rejected referrals of unique clients to other Programs within the column date range)
Stays (>=1 day)	(number of unique client stays >= 1 day within the column date range, note that this would include unique clients who were already staying in the Program at the beginning of the date range)

Report Layout:

Statistics – Program Name – Bedded program

Should be run on the 1st of the month


Occupancy – Unique Clients										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	= unique individuals
Intakes										New intakes entered within these date(s)
Admissions										New admissions within these date(s)
Discharges										New discharges within these date(s)
Accepted Referrals From Other Programs										Accepted from the queue and referred from another program within these date(s)
Rejected Referrals From Other Programs										Rejected from the queue from another program within these date(s)
Accepted Referrals To										Referrals to other

Other Programs										<i>programs that were accepted. Could be a service (non-bedded) program</i>
Rejected Referrals To Other Programs										<i>Referrals to other programs that were rejected. Could be a service (non-bedded) program</i>
Stays (>= 1 Day)										<i># of unique individuals with Stays at least 1 day after admission into the program</i>

Print Options: Browser Print

Export Option: [Excel](#)

Report Sample Screen:



Shelter:
User: Lee, Ben

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Testing...

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Occupancy Report

Statistics - Birkdale Residence - Bedded Program
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[Export to Excel](#)

Occupancy - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Intakes	0	0	0	2	2	0	7	9	22
Admissions	0	0	0	2	2	0	7	9	20
Discharges	0	2	1	0	2	1	3	5	26
Accepted Referrals From Other Programs	0	0	0	0	0	0	0	0	1
Rejected Referrals From Other Programs	0	0	0	0	0	0	0	0	0
Accepted Referrals To Other Programs	0	0	0	0	0	0	0	0	0
Rejected Referrals To Other Programs	0	0	0	0	0	0	0	0	1
Stays (>= 1day)	12	0	10	12	12	10	10	12	18

17. Program Client Services Screen – All Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: Supervisor & Manager roles

Description:

The Program based Client Services screen shows counts of new incidents, new service restrictions, new complaints and new case notes for the Program for various time frames. These stats can also be exported to Microsoft Excel format.

(Note that all Client Services stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

For example, if a new Case Note is written for a Client at 3 p.m. yesterday and another new Note written at 2 a.m. early today, they are both counted as for yesterday's business day.

Report Parameters:

None

Report Detail (Fields):

New Incidents	total number of new incidents recorded during the column date period)
New Service Restrictions	(total number of new service restrictions created during the column date period)
New Complaints	(total number of new complaints records during the column date period)
New Case Notes	(total number of new case notes created during the column date period)

Report Layout:

Statistics – Program Name – Bedded Program

Should be run on the 1st of the month


Client Services										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Not unique clients = same client could have multiple entries/coun ts per cell
New incidents										Only the incidents newly occurred in

										<i>this period</i>
New service restrictions										Only the Service Restrictions new in this period
New complaints										Only the complaints new in this period
New case notes										Only the case notes new in this period

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



Shelter:
User: Lee, Ben

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Extreme Cold Weather Alert is ON

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Discharge - Unique Clients
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Client Intake Report
Client Occupancy Report
Client Discharge Report
Occupancy Report

Statistics - Birkdale Residence - Bedded Program
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Client Services

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Incidents	0	0	0	1	1	0	0	1	1
New Service Restrictions	0	1	0	2	3	0	1	4	0
New Complaints	0	0	0	1	1	0	0	1	2
New Case Notes	0	0	4	2	2	5	3	5	7

18. Program Client Services – Unique Clients Screen – All Program

Report Category: Program

Access Via: Program Navigator

User Access Group: Supervisor & Manager roles

Description:

The Program based Client Services screen shows total number of unique clients involved in new incident reports(I.R.s), new service restrictions(S.R.s), new complaints and new case notes for the Program for various time frames. These stats can also be exported to Microsoft Excel format.

(Note that all Client Services stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

For example, if a new Case Note is written for a Client at 3 p.m. yesterday and another new Note written for a different Client at 2 a.m. early today, they are both counted as for yesterday's business day. However, if the 2nd Note was written for the same Client, then yesterday's count will only increase by 1 as this screen shows Unique Client counts during a date period.

Report Parameters:

None

Report Detail (Fields):

New Incidents	total number of unique clients involved in new incidents recorded during the column date period)
New Service Restrictions	(total number of unique clients given new service restrictions created during the column date period)
New Complaints	(total number of unique clients relating to new complaints records during the column date period)
New Case Notes	(total number of unique clients for which new case notes were created during the column date period)

Report Header:

Statistics – Program Name – Bedded Program

Should be run on the 1st of the month


Client services – unique clients										For: I.R./S.R./co plaints/ case notes
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	

New Incidents										<i># of unique clients with I.R. which occurred in this period</i>
New Service Restrictions										<i># of unique clients with S.R. entered this period</i>
New Complaints										<i># of unique clients with complaint entered this period</i>
New Case Notes										<i># of unique clients with case notes entered this period</i>

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:


 Shelter:
 User: Lee, Ben

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ert is ON Testing.....

Navigator

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Statistics - Birkdale Residence - Bedded Program

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Client Services - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Incidents	0	0	0	1	1	0	0	1	2
New Service Restrictions	0	1	0	2	3	0	1	4	0
New Complaints	0	0	0	1	1	0	0	1	2
New Case Notes	0	0	2	1	1	2	2	3	3

19. Program Discharge Screen – All (Bedded) Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: Supervisor & Manager roles

Description:

The Program based Discharge screen shows aggregate counts of various discharge dispositions and discharge reasons for the Program for various time frames. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Discharge, it is counted as 1 occurrence regardless of the number of family members present at the time of the discharge. However, if a single client or family is discharged more than once during any column date period, each discharge occurrence is counted regardless if it's the same or different disposition or reason.

For example, if a single client was discharge on the 2nd day of the month, and re-admitted and discharged in the middle of the same month and for the same discharge disposition but different discharge reasons, then he/she is counted twice for that month's discharge disposition count, and counted once for each of the two different monthly count of discharge reasons.

(Note that all Discharge stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

Report Parameters:

None

Report Detail (Fields):

Custody	(total number of client (single or family) discharges to custody within the column date period)	
Detox	(total number of client discharges to detox within the column date period)	
Escorted off premises	(total number of clients escorted off premises upon discharge within the column date period)	
Hospital	(total number of client discharges to hospital within the column date period)	
Housing	(total number of client discharges to housing within the column date period)	
Other	(total number of client discharges to other dispositions within the column date period)	
Other Hostels	(total number of client discharges to other hostels within the column date period)	
Unknown	(total number of client discharges to unknown dispositions within the column date period)	

Report Layout:

Statistics – Program Name – Bedded Program

Should be run on the 1st of the month

Discharge Dispositions										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>Could be the same person counted more than once</i>
Custody										# of discharges to custody
Detox										# of discharges made to detox
Escorted off premises										# of discharges escorted off premises
Hospital										# of discharges to hospital
Housing										# of discharges to housing
Other										# of discharges to Other but unidentified dispositions
Other Hostel										# of discharges to another Shelter Program
Unknown										# of discharges to Unknown dispositions

This section includes aggregate data for each discharge reason, and may include the same individual discharged various times for the same or different reasons. This list represents each individual discharge according to discharge reason that is entered into SMIS, and NOT unique clients' counts.

Discharge Reasons										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>Not unique clients = same client could have multiple entries, families are counted as one family head</i>
New Address – Private Housing										
New Address – Transitional Housing										
New Address – Subsidized Housing										
Returned to Previous Address										
Reunited with family/ friends										
Detox										
Residential Treatment Program										
Long-Term Care Facility										
Left the City										
Hospitalized										
Incarcerated										
Decided to leave										
Failed to return										
Not following case plan										
Not participating in case planning										
Repeated rule violations										
Disruptive										


rule violations										
Disruptive behaviour										
Violent or threatening behaviour										
Health & Safety of residents, volunteers or staff										
Assault of residents, volunteers or staff										
Wielding weapons or dangerous objects										
Possession of firearms										
Possession of illegal substances/ contraband										
Trafficking in illegal drugs										
Other										
Automatic discharge – client admitted to another program										
Daily discharge										This is a reason unique to only a few Programs that are closed during certain hours and require all individuals to leave the Program at that time.

Death										
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Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



Shelter:
User: Lee, Ben

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Statistics - Birkdale Residence

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Discharge Dispositions

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Custody	0	0	1	0	0	3	0	1	4
Detox	0	0	1	0	0	5	0	0	7
Escorted off premises	0	0	0	0	0	5	0	1	8
Hospital	0	0	0	0	0	1	0	0	1
Housing	0	0	0	0	0	5	0	2	7
Other	0	0	0	1	0	5	1	2	6
Other Hostel	0	0	1	1	0	2	1	1	2
Unknown	0	0	0	0	0	8	0	0	8

Discharge Reasons

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Address - Private Housing	0	0	7	0	0	7	0	3	11
New Address - Transitional Housing	0	0	1	0	0	7	0	0	9
New Address - Subsidized Housing	0	0	0	0	0	1	0	0	3
Returned To Previous Address	0	0	0	0	0	3	0	0	3
Reunited with family/friends	0	0	0	0	0	1	0	0	1
Detox	0	0	1	0	0	2	0	0	2
Residential treatment program	0	0	0	0	0	0	0	0	0

Reunited with family/friends	0	0	0	0	0	1	0	0	1
Detox	0	0	1	0	0	2	0	0	2
Residential treatment program	0	0	0	0	0	0	0	0	0
Long-term care facilities	0	0	0	0	0	0	0	0	0
Left The City	0	0	1	0	0	1	0	0	1
Hospitalized	0	0	0	0	0	0	0	0	0
Incarcerated	0	0	0	0	0	0	0	0	0
Decided to leave	0	0	0	0	0	1	0	0	2
Failed to return	0	0	0	0	0	0	0	0	0
Not following case plan	0	0	0	0	0	1	0	0	1
Not participating in case planning	0	0	0	0	0	0	0	0	0
Repeated rule violations	0	0	0	0	0	0	0	0	0
Disruptive behaviour	0	0	1	0	0	2	0	0	2
Violent or threatening behaviour	0	0	0	0	0	0	0	0	0
Health & Safety of residents, volunteers or staff	0	0	0	0	0	0	0	0	0
Assault of residents, volunteers or staff	0	0	0	0	0	0	0	1	0
Wielding weapons or dangerous objects	0	0	0	0	0	0	0	0	0
Possession of firearms	0	0	0	0	0	0	0	0	0
Possession of illegal substances/contraband	0	0	0	0	0	0	0	0	0
Trafficking in illegal drugs	0	0	0	0	0	0	0	0	0
Other	0	0	6	0	0	6	0	0	6
Automatic discharge - Client admitted to another program	0	0	1	2	0	1	2	3	1
Daily Discharge	0	0	1	0	0	1	0	0	1
Death	0	0	0	0	0	0	0	0	0

20. Program Discharge – Unique Clients Screen – All (Bedded) Programs

Report Category: Program

Access Via: Program Navigator

User Access Group: Supervisor & Manager roles

Description:

The Program based Discharge screen shows aggregate counts of unique clients for various discharge dispositions and discharge reasons for the Program during the various time frames. For example, if a client is discharge twice from two admissions during a column date period, then he/she is counted as 1 unique client discharge during that period. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Discharge, each unique family member is counted individually when present at the time of the action. However, if a family member is part of two different family discharges during the same reporting date period (i.e. column cell), then he/she is counted as only 1 unique individual on this screen. Also, if a single client is discharged more than once during any column date period, the count only increments by 1.

For example, if a single client was discharge on the 2nd day of the month, and re-admitted and discharged in the middle of the same month and for the same discharge disposition but different discharge reasons, then he/she is counted only once for that month's discharge disposition count, but is counted once for each of the two different monthly count of discharge reasons.

(Note that all Discharge stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

Report Parameters:

None

Report Detail (Fields):

Discharge Disposition (Where Client was discharged to...)

Custody	(total number of unique client (single or individual family member) discharges to custody within the column date period)
Detox	(total number of client discharges to detox within the column date period)
Escorted off premises	(total number of unique clients escorted off premises upon discharge within the column date period)
Hospital	(total number of unique client discharges to hospital within the column date period)
Housing	(total number of unique client discharges to housing within the column date period)
Other	(total number of unique client discharges to other dispositions within the column date period)
Other Hostels	(total number of unique client discharges to other hostels within the column date period)

Unknown	(total number of unique client discharges to unknown dispositions within the column date period)
---------	--

Discharge Reason (Reason for which Client was discharged...)

See figure below for details.

Report Layout:

Statistics – Program Name – Bedded Program

Should be run on the 1st of the month

Discharge Dispositions										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Unique clients = same client is counted only once, families members are counted as individuals also
Custody										Includes all discharges to custody entered in the identified period regardless of the individual – i.e. one person may be discharged more than once to "custody"
Detox										Includes all unique client discharges to Detox.
Escorted off premises										Includes all unique client discharges

										<i>escorted off premises.</i>
Hospital										<i>Includes all unique client discharges to the hospital</i>
Housing										<i>Includes all unique client discharges to housing.</i>
Other										<i>Includes all unique client discharges for unidentified dispositions.</i>
Other Hostel										<i>Includes all unique client discharges to another program. This would include all automatic discharges as a result of the individual being admitted to another program</i>
Unknown										<i>Includes all unique client discharges to unknown disposition (usually a fail-to-return).</i>

Discharge Reasons – Unique Clients											
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Unique individuals per discharge reason regardless of the # of times	
New Address –											


Private Housing										
New Address – Transitional Housing										
New Address – Subsidized Housing										
Returned to Previous Address										
Reunited with family/ friends										
Detox										
Residential Treatment Program										
Long-Term Care Facility										
Left the City										
Hospitalized										
Incarcerated										
Decided to leave										
Failed to return										
Not following case plan										
Not participating in case planning										
Repeated rule violations										
Disruptive rule violations										
Disruptive behaviour										
Violent or threatening behaviour										
Health & Safety of										

residents, volunteers or staff										
Assault of residents, volunteers or staff										
Wielding weapons or dangerous objects										
Possession of firearms										
Possession of illegal substances/contraband										
Trafficking in illegal drugs										
Other										
Automatic discharge – client admitted to another program										
Daily discharge										This is a reason unique to only a few Programs that are closed during certain hours and require all individuals to leave the Program at that time.
Death										

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



Shelter:
User: Lee, Ben

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Statistics - Birkdale Residence

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Discharge Dispositions - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Custody	0	0	2	0	0	3	0	1	4
Detox	0	0	2	0	0	3	0	0	5
Escorted off premises	0	0	0	0	0	1	0	1	4
Hospital	0	0	0	0	0	1	0	0	1
Housing	0	0	2	0	0	3	0	2	5
Other	0	0	4	1	0	5	1	1	6
Other Hostel	0	0	2	1	0	2	1	1	2
Unknown	0	0	6	0	0	7	0	0	7

Discharge Reasons - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Address - Private Housing	0	0	6	0	0	6	0	3	10
New Address - Transitional Housing	0	0	1	0	0	2	0	0	4
New Address - Subsidized Housing	0	0	0	0	0	1	0	0	3
Returned To Previous Address	0	0	0	0	0	1	0	0	1
Reunited with family/friends	0	0	0	0	0	1	0	0	1
Detox	0	0	1	0	0	2	0	0	2
Residential treatment program	0	0	0	0	0	0	0	0	0

Long-term care facilities	0	0	0	0	0	0	0	0	0
Left The City	0	0	1	0	0	1	0	0	1
Hospitalized	0	0	0	0	0	0	0	0	0
Incarcerated	0	0	0	0	0	0	0	0	0
Decided to leave	0	0	0	0	0	1	0	0	2
Failed to return	0	0	0	0	0	0	0	0	0
Not following case plan	0	0	0	0	0	1	0	0	1
Not participating in case planning	0	0	0	0	0	0	0	0	0
Repeated rule violations	0	0	0	0	0	0	0	0	0
Disruptive behaviour	0	0	1	0	0	2	0	0	2
Violent or threatening behaviour	0	0	0	0	0	0	0	0	0
Health & Safety of residents, volunteers or staff	0	0	0	0	0	0	0	0	0
Assault of residents, volunteers or staff	0	0	0	0	0	0	0	1	0
Wielding weapons or dangerous objects	0	0	0	0	0	0	0	0	0
Possession of firearms	0	0	0	0	0	0	0	0	0
Possession of illegal substances/contraband	0	0	0	0	0	0	0	0	0
Trafficking in illegal drugs	0	0	0	0	0	0	0	0	0
Other	0	0	6	0	0	6	0	0	6
Automatic discharge - Client admitted to another program	0	0	1	2	0	1	2	2	1
Daily Discharge	0	0	1	0	0	1	0	0	1
Death	0	0	0	0	0	0	0	0	0

21. Facility Dashboard Screen – All Programs

Report Category: Facility

Access Via: Facility Navigator

User Access Group: All Shelter Users

Description:

This Facility based dashboard screen shows **real-time** Occupancy, Bed Nights, Incidents, Service Restrictions, Complaints and Case Notes aggregate statistics for a Facility.

Note that all Occupancy stats, unless stated as “current” otherwise, are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4 a.m. and update any occupancy changes timely into SMIS.

Report Parameters:

None

Report Detail (Fields):

See below for more details...

Report Layout:

Facility Dashboard

This report is accessed through the left side Navigator and provides real-time occupancy information. The Reports icon at the top right will soon be deleted and all reports will be accessed through the Program icon.

Occupancy			
Active intakes without admission	<i>This number represents all the active intakes that were entered at your shelter facility. All intakes that have been active for 18 hours or more and are not admitted to your shelter will expire at midnight each night.</i>	Vacancy	<i>This number represents funded capacity less the active admissions or occupancy of your facility and cannot be negative.</i>
Referrals from other Facilities	<i>This number represents referrals from other facilities</i>	Vacancy rate	<i>Vacancy divided by funded capacity</i>
Queue	<i>This number includes</i>	Current capacity	<i>The number represents</i>

	<i>external referrals as well as internal intakes</i>		<i>active beds available in your shelter facility. This will not include any beds you have made unavailable because of e.g. bed bugs, maintenance, etc. This number will be less than or equal to your space capacity</i>
Occupancy (active admissions)	<i>This number represents currently occupied beds</i>	Funded capacity	<i>As per Operating Agreement</i>
Occupancy rate	<i>100% minus the Vacancy Rate</i>		

Bed Nights			
Yesterday	<i>Number of beds occupied as of 4:00 a.m. this morning represents the bed nights for yesterday</i>	Past 30 Days	<i>All occupied beds for the past 30 days up to yesterday (4:00 a.m. this morning)</i>
Current Month	<i>Includes the number of all occupied beds for the current month, up to 4:00 a.m. this morning</i>	Previous Month	<i>All occupied beds in the previous calendar month</i>

Incidents	
New incidents past 30 days	<i>All New incidents occurred in the past 30 days up till 4:00 a.m. this morning</i>
New incidents this calendar month	<i>All New incidents occurred in the current month up till 4:00 a.m. this morning</i>
Open incidents	<i>This number represents all incidents that have not been concluded or closed. All incidents should be completed and closed through internal review and sign off procedure.</i>

Service Restrictions							
<i>This report does not provide aggregate numbers. One restriction may be represented in more than one category. The duration will be recorded as the original duration applied at the time of recording the service restriction. All service restrictions recorded up to 4:00 a.m. this morning will be included. You must notify and discuss all lengthy service restrictions with your Agency Review Officer at Hostel Services</i>							
Original duration of restriction (in days)	1-7	8-14	15-30	31-60	61-90	91-180	180+

New restrictions past 30 days							
New restrictions this calendar month							
Currently active							
Terminated early past 30 days							
Expired past 30 days							

Complaints			
New Complaints Past 30 Days			
New Complaints This Calendar Month			
Open Complaints (<30 Days Old)			
Open Complaints (30-60 Days Old)			
Open Complaints (>60 Days Old)			

Case Notes			
New Notes Past 30 Days			
New Notes This Calendar Month			
Incomplete Notes (<30 Days Old)			
Incomplete Notes (30-60 Days Old)			
Incomplete Notes (>60 Days Old)			

Print Options: Browser Print

Report Sample Screen:



Shelter:
User: Lee, Ben

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Testing.....

2 alerts

Birkdale Residence (11794)
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Discharges - Unique Clients

Facility Dashboard - Birkdale Residence

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Program Type

Occupancy

Active Intakes without Admission	0	Vacancy	0
Referrals from Other Facilities	0	Vacancy Rate	0%
Queue	0	Current Capacity	193
Occupancy(Active Admissions)	10	Funded Capacity	5
Occupancy Rate	200%		

Bed Nights

Yesterday	12	Past 30 Days	356
Current Month	0	Previous Month	356

Incidents

New Incidents Past 30 Days	1		
New Incidents This Calendar Month	0		
Open Incidents	2		

Service Restrictions

Original Duration of Restriction (in Days)	1 - 7	8 - 14	15 - 30	31 - 60	61 - 90	91 - 180	>180
New Restrictions Past 30 Days	0	0	0	0	0	0	0
New Restrictions This Calendar Month	0	0	0	0	0	0	0
Currently Active	0	0	0	0	0	0	0
Terminated Early Past 30 Days	0	0	0	0	0	0	0
Expired Past 30 Days	0	0	0	0	0	0	0
Expired Next 30 Days	0	0	0	0	0	0	0

New Incidents Past 30 Days	1		
New Incidents This Calendar Month	0		
Open Incidents	2		

Service Restrictions

Original Duration of Restriction (in Days)	1 - 7	8 - 14	15 - 30	31 - 60	61 - 90	91 - 180	>180
New Restrictions Past 30 Days	0	0	0	0	0	0	0
New Restrictions This Calendar Month	0	0	0	0	0	0	0
Currently Active	0	0	0	0	0	0	0
Terminated Early Past 30 Days	0	0	0	0	0	0	0
Expired Past 30 Days	0	0	0	0	0	0	0
Expired Next 30 Days	0	0	0	0	0	0	0

Complaints

New Complaints Past 30 Days	1		
New Complaints This Calendar Month	0		
Open Complaints (<30 Days Old)	1		
Open Complaints (30 - 60 Days Old)	0		
Open Complaints (>60 Days Old)	1		

Case Notes

New Notes Past 30 Days	2		
New Notes This Calendar Month	0		
Incomplete Notes (<30 Days Old)	0		
Incomplete Notes (30 - 60 Days Old)	0		
Incomplete Notes (>60 Days Old)	5		

22. Facility Occupancy Screen – All Programs

Report Category: Facility

Access Via: Facility Navigator

User Access Group: Supervisor & Manager roles

Description:

This Facility based Occupancy screen shows statistics for new intakes, new admissions, discharges, accepted and rejected referrals to and from other Facilities, any stays ≥ 1 day and total bed nights for the Facility. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Intake, Admission, Discharge, Referral and Stay is counted as 1 occurrence regardless of the number of family members present at the time of the action. The only exception is the Bed Nights row, for which each family member contributes to the count.

(Note that all Occupancy stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4.a.m. and update any occupancy changes timely into SMIS.)

All Stays are based upon the 4 a.m. threshold and are counted only if the client stays pass this time. However, Admissions stats does not require the client to stay pass the 4 a.m. threshold. For example, if a client is admitted at 11 p.m. and is discharged few hours later at 1 a.m., the new Intake, Admission and Discharge stats will increase its count by 1 respectively, but NOT the Stays count since the client did not stay passed the 4 a.m. threshold.

Report Parameters:

None

Report Detail (Fields):

Intakes	(number of new intakes within the column date range)
Admissions	(number of new admissions within the column date range)
Discharges	(number of discharges within the column date range)
Accepted Referrals From Other Facilities	(number of accepted referrals from other Facilities within the column date range)
Rejected Referrals From Other Facilities	(number of rejected referrals from other Facilities within the column date range)
Accepted Referrals To Other Facilities	(number of accepted referrals to other Facilities within the column date range)
Rejected Referrals To Other Facilities	(number of rejected referrals to other Facilities within the column date range)
Stays (≥ 1 day)	(number of client stays ≥ 1 day within the column date range, note that this would include clients who were already staying in the Facility at the beginning of the date range)
Bed Nights	(number of total bed nights of all clients within the column date range)

	date range)
--	-------------

Report Layout:

Statistics – Facility Name – Bedded Program

Should be run on the 1st of the month to capture complete Previous Month's totals

Occupancy	As of 4:00 a.m. today = yesterdays statistics									
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	description
Intakes										New intakes entered within these dates
Admissions										New admissions within these dates
Discharges										New discharges within these dates
Accepted Referrals From Other Facility										Accepted from the queue and referred from another facility within these date(s)
Rejected Referrals From Other Facility										Rejected from the queue from another facility within these date(s)
Accepted Referrals To										Referrals to other

Other Facility										<i>facilities that were accepted. Could be a service (non-bedded) facility</i>
Rejected Referrals To Other Facility										<i>Referrals to other facilities that were rejected. Could be a service (non-bedded) facility</i>
Stays (>=1 day)										<i># of clients (singles & family heads only) who stayed at least 1 day in the Facility</i>
Bednights										<i># of individual bed nights, all singles and all members of families get counted here.</i>

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:

Toronto

SMIS

Shelter:

User: Lee, Ben

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Birkdale Residence (11794)

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Occupancy - Unique Clients

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Client Services - Unique Clients

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Discharges - Unique Clients

Statistics - Birkdale Residence

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Occupancy

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Intakes	0	0	0	1	1	0	6	7	31
Admissions	0	0	0	1	1	0	6	7	29
Discharges	0	1	1	0	1	1	3	4	32
Accepted Referrals From Other Facilities	0	0	0	0	0	0	0	0	1
Rejected Referrals From Other Facilities	0	0	0	0	0	0	0	0	0
Accepted Referrals To Other Facilities	0	0	0	0	0	0	0	0	0
Rejected Referrals To Other Facilities	0	0	0	0	0	0	0	0	1
Stays (>= 1day)	6	0	6	6	6	6	5	6	11
Bed Nights	12	0	295	356	356	865	549	905	3224

23. Facility Occupancy – Unique Clients Screen

Report Category: Facility

Access Via: Facility Navigator

User Access Group: Supervisor & Manager roles

Description:

This Facility based Occupancy screen shows statistics for total number of unique clients with new intakes, new admissions, discharges, accepted and rejected referrals to and from other Facilities, any stays ≥ 1 day and total bed nights for the Facility for the various date ranges. For example, if a client has 2 "new" intakes during the column period, then it is counted as 1 unique client intake only. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family*, each Intake, Admission, Discharge, Referral and Stay, each unique family member is counted individually when present at the time of the action. However, if a family member is part of two different family intakes, admission or other actions during one single reporting date range, then he/she is counted as 1 unique individual on this screen.

(Note that all Occupancy stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4.a.m. and update any occupancy changes timely into SMIS.)

All Stays are based upon the 4 a.m. threshold and are counted only if the client stays pass this time. However, Admissions stats does not require the client to stay pass the 4 a.m. threshold. For example, if a client is admitted at 11 p.m. and is discharged few hours later at 1 a.m., the new Intake, Admission and Discharge stats will increase its count by 1 respectively, but NOT the Stays count since the client did not stay passed the 4 a.m. threshold.

Report Parameters:

None

Report Detail (Fields):

Intakes	(number of unique clients with new intakes within the column date range)
Admissions	(number of unique clients with new admissions within the column date range)
Discharges	(number of unique clients with discharges within the column date range)
Accepted Referrals From Other Facilities	(number of accepted referrals of unique clients from other facilities within the column date range)
Rejected Referrals From Other Facilities	(number of rejected referrals of unique clients from other Facilities within the column date range)
Accepted Referrals To Other Facilities	(number of accepted referrals of unique clients to other Facilities within the column date range)

Rejected Referrals To Other Facilities	(number of rejected referrals of unique clients to other Facilities within the column date range)
Stays (>=1 day)	(number of client stays >= 1 day within the column date range, note that this would include unique clients who were already staying in the Facility at the beginning of the date range)

Report Header:

Statistics – Facility Name – Bedded program

Should be run on the 1st of the month to capture complete Previous Month's totals

Occupancy – Unique Clients										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	= unique individuals
Intakes										All new for the day/period defined
Admissions										
Discharges										
Accepted Referrals From Other Facility										
Rejected Referrals From Other Facility										
Accepted Referrals To Other Facility										
Rejected Referrals To Other Facility										
Stays (>= 1 Day)										= total stays

Print Options: Browser Print

Export Options: [Excel](#)

Report Sample Screen:



Shelter:
User: Lee, Ben

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Alert is ON

2 alerts

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Statistics - Birkdale Residence

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Occupancy - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Intakes	0	0	0	2	2	0	7	9	22
Admissions	0	0	0	2	2	0	7	9	20
Discharges	0	2	1	0	2	1	3	5	26
Accepted Referrals From Other Facilities	0	0	0	0	0	0	0	0	1
Rejected Referrals From Other Facilities	0	0	0	0	0	0	0	0	0
Accepted Referrals To Other Facilities	0	0	0	0	0	0	0	0	0
Rejected Referrals To Other Facilities	0	0	0	0	0	0	0	0	1
Stays (>= 1day)	12	0	10	12	12	10	10	12	18

24. Facility Client Services Screen

Report Category: Facility

Access Via: Facility Navigator

User Access Group: Supervisor & Manager roles

Description:

This Facility based Client Services screen shows counts of new incidents, new service restrictions, new complaints and new case notes for the Facility for various time frames. These stats can also be exported to Microsoft Excel format.

Report Parameters:

None

Report Detail (Fields):

New Incidents	(total number of new incidents recorded during the column date period)
New Service Restrictions	(total number of new service restrictions created during the column date period)
New Complaints	(total number of new complaints records during the column date period)
New Case Notes	(total number of new case notes created during the column date period)

Report Layout:

Statistics – Facility Name – Bedded Program

Should be run on the 1st of the month to capture complete Previous Month's totals

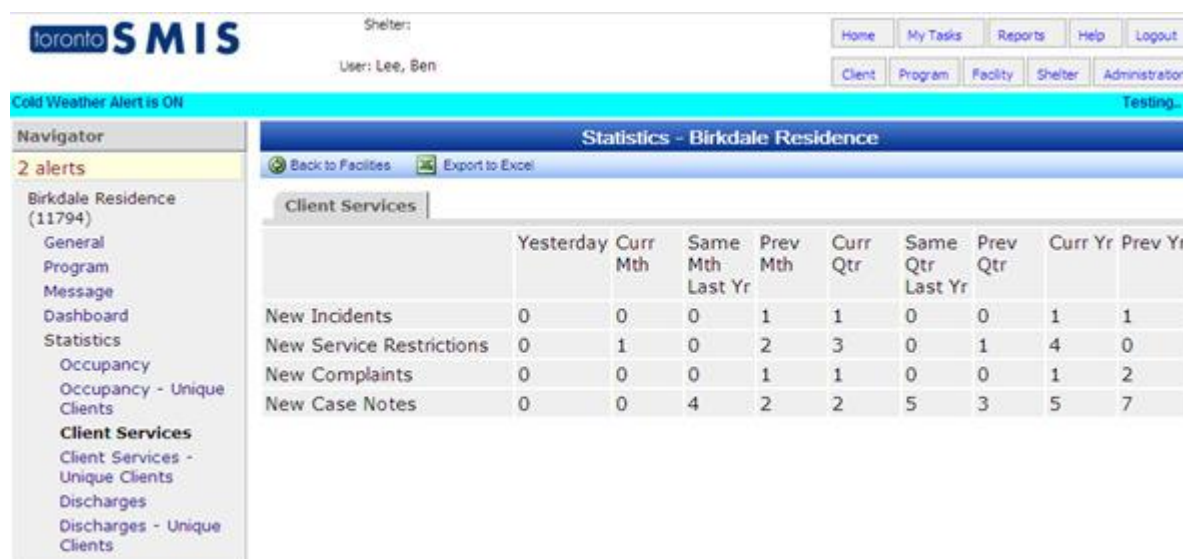
Client Services		Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Not unique clients = same client could have multiple entries
New incidents											Only the incidents newly occurred in this period
New service restrictions											Only the S.R. new in this period
New complaints											Only the complaints

										<i>new in this period</i>
New case notes										<i>Only the case notes new in this period</i>

Print Options: Browser Print

Export Options: [Excel](#)

Report Sample Screen:



Statistics - Birkdale Residence

Client Services

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Incidents	0	0	0	1	1	0	0	1	1
New Service Restrictions	0	1	0	2	3	0	1	4	0
New Complaints	0	0	0	1	1	0	0	1	2
New Case Notes	0	0	4	2	2	5	3	5	7

25. Facility Client Services – Unique Clients Screen

Report Category: Facility

Access Via: Facility Navigator

User Access Group: Supervisor & Manager roles

Description:

This Facility based Client Services screen shows total number of unique clients involved in new incidents, new service restrictions, new complaints and new case notes for the Facility for various time frames. These stats can also be exported to Microsoft Excel format.

Report Parameters:

None

Report Detail (Fields):

New Incidents	(total number of unique clients involved in new incidents recorded during the column date period)
New Service Restrictions	(total number of unique clients given new service restrictions created during the column date period)
New Complaints	(total number of unique clients relating to new complaints records during the column date period)
New Case Notes	(total number of unique clients for which new case notes created during the column date period)

Report Layout:

Statistics – Facility Name – Bedded Program

Should be run on the 1st of the month to capture complete Previous Month's totals


Client services – unique clients										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>not the total number of I.R./S.R./complaints/case notes</i>
New Incidents										<i># of unique clients with incidents. newly occurred in this period</i>

New Service Restrictions										<i># of unique clients with S.R. entered this period</i>
New Complaints										<i># of unique clients with complaint entered this period</i>
New Case Notes										<i># of unique clients with case notes entered this period</i>

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Incidents	0	0	0	1	1	0	0	1	2
New Service Restrictions	0	1	0	2	3	0	1	4	0
New Complaints	0	0	0	1	1	0	0	1	2
New Case Notes	0	0	2	1	1	2	2	3	3

26. Facility Discharge Screen – All Programs

Report Category: Facility

Access Via: Facility Navigator

User Access Group: Supervisor & Manager roles

Description:

This Facility based Discharge screen shows counts of various discharge dispositions for the Facility for various time frames. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Discharge, it is counted as 1 occurrence regardless of the number of family members present at the time of the discharge. However, if a single client or family is discharged more than once during any column date period, each discharge occurrence is counted regardless if it's the same or different disposition or reason.

For example, if a single client was discharge on the 2nd day of the month, and re-admitted and discharged in the middle of the same month and for the same discharge disposition but different discharge reasons, then he/she is counted twice for that month's discharge disposition count, and counted once for each of the two different monthly count of discharge reasons.

(Note that all Discharge stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

Report Parameters:

None

Report Detail (Fields):

Custody	(total number of client discharges to custody within the column date period)
Detox	(total number of client discharges to detox within the column date period)
Escorted off premises	(total number of clients escorted off premises upon discharge within the column date period)
Hospital	(total number of client discharges to hospital within the column date period)
Housing	(total number of client discharges to housing within the column date period)
Other	(total number of client discharges to other dispositions within the column date period)
Other Hostels	(total number of client discharges to other hostels within the column date period)
Unknown	(total number of client discharges to unknown dispositions within the column date period)

Report Layout:

Statistics – Facility Name – Bedded Program

Should be run on the 1st of the month to capture complete Previous Month's totals

Discharge Disposition										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>Could be the same person more than once</i>
Custody										<i># of discharges to custody</i>
Detox										<i># of discharges made to detox</i>
Escorted off premises										<i># of discharges escorted off premises</i>
Hospital										<i># of discharges to hospital</i>
Housing										<i># of discharges to housing</i>
Other										<i># of discharges to Other but unidentified dispositions</i>
Other Hostel										<i># of discharges to another Shelter</i>
Unknown										<i># of discharges to Unknown dispositions</i>

This section includes aggregate data for each discharge reason, and may include the same individual discharged various times for the same or different reasons. This list represents each individual discharge according to discharge reason that is entered into SMIS.

The last three underlined reasons are new.

Discharge Reasons										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>Not unique clients = same client could have multiple entries, families are counted as one family head</i>
New Address – Private Housing										
New Address – Transitional Housing										
New Address – Subsidized Housing										
Returned to Previous Address										
Reunited with family/ friends										
Detox										
Residential Treatment Program										
Long-Term Care Facility										
Left the City										
Hospitalized										
Incarcerated										
Decided to leave										
Failed to return										
Not following case plan										
Not participating in case planning										
Repeated rule violations										


Disruptive rule violations										
Disruptive behaviour										
Violent or threatening behaviour										
Health & Safety of residents, volunteers or staff										
Assault of residents, volunteers or staff										
Wielding weapons or dangerous objects										
Possession of firearms										
Possession of illegal substances/ contraband										
Trafficking in illegal drugs										
Other										
<u>Automatic discharge – client admitted to another program</u>										
<u>Daily discharge</u>										This is a reason unique to only a few Programs that are closed during certain hours and require all individuals to leave the Program at

										that time.
Death										

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



Shelter:
User: Lee, Ben

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Discharge Dispositions

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Custody	0	0	1	0	0	3	0	1	4
Detox	0	0	1	0	0	5	0	0	7
Escorted off premises	0	0	0	0	0	5	0	1	8
Hospital	0	0	0	0	0	1	0	0	1
Housing	0	0	0	0	0	5	0	2	7
Other	0	0	0	1	0	5	1	2	6
Other Hostel	0	0	1	1	0	2	1	1	2
Unknown	0	0	0	0	0	8	0	0	8

Discharge Reasons

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Address - Private Housing	0	0	7	0	0	7	0	3	11
New Address - Transitional Housing	0	0	1	0	0	7	0	0	9
New Address - Subsidized Housing	0	0	0	0	0	1	0	0	3
Returned To Previous Address	0	0	0	0	0	3	0	0	3
Reunited with family/friends	0	0	0	0	0	1	0	0	1
Detox	0	0	1	0	0	2	0	0	2
Residential treatment program	0	0	0	0	0	0	0	0	0

Long-term care facilities	0	0	0	0	0	0	0	0	0
Left The City	0	0	1	0	0	1	0	0	1
Hospitalized	0	0	0	0	0	0	0	0	0
Incarcerated	0	0	0	0	0	0	0	0	0
Decided to leave	0	0	0	0	0	1	0	0	2
Failed to return	0	0	0	0	0	0	0	0	0
Not following case plan	0	0	0	0	0	1	0	0	1
Not participating in case planning	0	0	0	0	0	0	0	0	0
Repeated rule violations	0	0	0	0	0	0	0	0	0
Disruptive behaviour	0	0	1	0	0	2	0	0	2
Violent or threatening behaviour	0	0	0	0	0	0	0	0	0
Health & Safety of residents, volunteers or staff	0	0	0	0	0	0	0	0	0
Assault of residents, volunteers or staff	0	0	0	0	0	0	0	1	0
Wielding weapons or dangerous objects	0	0	0	0	0	0	0	0	0
Possession of firearms	0	0	0	0	0	0	0	0	0
Possession of illegal substances/contraband	0	0	0	0	0	0	0	0	0
Trafficking in illegal drugs	0	0	0	0	0	0	0	0	0
Other	0	0	6	0	0	6	0	0	6
Automatic discharge - Client admitted to another program	0	0	1	2	0	1	2	3	1
Daily Discharge	0	0	1	0	0	1	0	0	1
Death	0	0	0	0	0	0	0	0	0

27. Facility Discharge – Unique Clients Screen – All Program

Report Category: Facility

Access Via: Facility Navigator

User Access Group: Supervisor & Manager roles

Description:

This Facility based Discharge screen shows counts unique clients for various discharge dispositions for the Facility during the various time frames. For example, if a client is discharge twice from two admissions during a column date period, then it is counted as only one unique client discharge. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Discharge, each unique family member is counted individually when present at the time of the action. However, if a family member is part of two different family discharges during the same reporting date period (i.e. column cell), then he/she is counted as only 1 unique individual on this screen. Also, if a single client is discharged more than once during any column date period, the count only increments by 1.

For example, if a single client was discharge on the 2nd day of the month, and re-admitted and discharged in the middle of the same month and for the same discharge disposition but different discharge reasons, then he/she is counted only once for that month's discharge disposition count, but is counted once for each of the two different monthly count of discharge reasons.

(Note that all Discharge stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

Report Parameters:

None

Report Detail (Fields):

Custody	(total number of unique client discharges to custody within the column date period)
Detox	(total number of unique client discharges to detox within the column date period)
Escorted off premises	(total number of unique clients escorted off premises upon discharge within the column date period)
Hospital	(total number of unique client discharges to hospital within the column date period)
Housing	(total number of unique client discharges to housing within the column date period)
Other	(total number of unique client discharges to other dispositions within the column date period)
Other Hostels	(total number of unique client discharges to other hostels within the column date period)
Unknown	(total number of unique client discharges to unknown dispositions)

	within the column date period)
--	--------------------------------

Report Layout:

Statistics – Facility Name – Bedded Program

Should be run on the 1st of the month to capture complete Previous Month's totals

Discharge Disposition – Unique Clients										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Unique individuals per discharge reason
Custody										# of clients discharged to custody
Detox										# of clients discharged to detox
Escorted off premises										# of clients discharged and escorted off premises
Hospital										# of clients discharged to hospital
Housing										# of clients discharged to housing
Other										# of clients discharged to Other but unidentified dispositions
Other Hostel										# of clients discharged to another Shelter
Unknown										# of clients discharged to Unknown dispositions

Discharge Reasons – Unique Clients										
	Yesterday	Curr Mth	Same Mth	Prev Mth	Curr Qtr	Same Qtr	Prev Qtr	Curr Yr	Prev Yr	Unique individuals


			Last Yr			Last Yr				<i>per discharge reason regardless of the # of times</i>
New Address – Private Housing										
New Address – Transitional Housing										
New Address – Subsidized Housing										
Returned to Previous Address										
Reunited with family/ friends										
Detox										
Residential Treatment Program										
Long-Term Care Facility										
Left the City										
Hospitalized										
Incarcerated										
Decided to leave										
Failed to return										
Not following case plan										
Not participating in case planning										
Repeated rule violations										
Disruptive rule violations										
Disruptive behaviour										
Violent or										

threatening behaviour										
Health & Safety of residents, volunteers or staff										
Assault of residents, volunteers or staff										
Wielding weapons or dangerous objects										
Possession of firearms										
Possession of illegal substances/ contraband										
Trafficking in illegal drugs										
Other										
<u>Automatic discharge – client admitted to another program</u>										
<u>Daily discharge</u>										This is a reason unique to only a few Programs that are closed during certain hours and require all individuals to leave the Program at that time.
<u>Death</u>										

Print Options: Browser Print

Export Options: [Excel](#)

Report Sample Screen:



Shelter:
 User: Lee, Ben

Home

My Tasks

Reports

Administration

Help

Logout

Client

Program

Facility

Shelter

Head Office

Navigator
 Birkdale Residence (11794)
 General
 Program
 Message
 Dashboard
 Statistics
 Occupancy
 Occupancy - Unique Clients
 Client Services
 Client Services - Unique Clients
 Discharges
 Discharges - Unique Clients
 Reports
 Client Report
 Client Intake Report
 Client Occupancy Report
 Client Discharge Report
 Occupancy Report
 Service Restriction Report
 [+] Financial

Statistics - Birkdale Residence

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Discharge Dispositions - Unique Clients


	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Custody	0	0	2	0	0	3	0	1	4
Detox	0	0	2	0	0	3	0	0	5
Escorted off premises	0	0	0	0	0	1	0	1	4
Hospital	0	0	0	0	0	1	0	0	1
Housing	0	0	2	0	0	3	0	2	5
Other	0	0	4	1	0	5	1	1	6
Other Hostel	0	0	2	1	0	2	1	1	2
Unknown	0	0	6	0	0	7	0	0	7

Discharge Reasons - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Address - Private Housing	0	0	6	0	0	6	0	3	10
New Address - Transitional Housing	0	0	1	0	0	2	0	0	4
New Address - Subsidized Housing	0	0	0	0	0	1	0	0	3
Returned To Previous Address	0	0	0	0	0	1	0	0	1
Reunited with family/friends	0	0	0	0	0	1	0	0	1
Detox	0	0	1	0	0	2	0	0	2
Residential treatment program	0	0	0	0	0	0	0	0	0

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Long-term care facilities	0	0	0	0	0	0	0	0	0
Left The City	0	0	1	0	0	1	0	0	1
Hospitalized	0	0	0	0	0	0	0	0	0
Incarcerated	0	0	0	0	0	0	0	0	0
Decided to leave	0	0	0	0	0	1	0	0	2
Failed to return	0	0	0	0	0	0	0	0	0
Not following case plan	0	0	0	0	0	1	0	0	1
Not participating in case planning	0	0	0	0	0	0	0	0	0
Repeated rule violations	0	0	0	0	0	0	0	0	0
Disruptive behaviour	0	0	1	0	0	2	0	0	2
Violent or threatening behaviour	0	0	0	0	0	0	0	0	0
Health & Safety of residents, volunteers or staff	0	0	0	0	0	0	0	0	0
Assault of residents, volunteers or staff	0	0	0	0	0	0	0	1	0
Wielding weapons or dangerous objects	0	0	0	0	0	0	0	0	0
Possession of firearms	0	0	0	0	0	0	0	0	0
Possession of illegal substances/contraband	0	0	0	0	0	0	0	0	0
Trafficking in illegal drugs	0	0	0	0	0	0	0	0	0
Other	0	0	6	0	0	6	0	0	6
Automatic discharge - Client admitted to another program	0	0	1	2	0	1	2	2	1
Daily Discharge	0	0	1	0	0	1	0	0	1
Death	0	0	0	0	0	0	0	0	0

28. Shelter Dashboard Screen

Report Category: Shelter

Access Via: Shelter Navigator

User Access Group: All Shelter Users

Description:

This Shelter based dashboard screen shows **real-time** Occupancy, Bed Nights, Incidents, Service Restrictions, Complaints and Case Notes aggregate statistics for all Programs within the Shelter.

Note that all Occupancy stats, unless stated as “current” otherwise, are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4 a.m. and update any occupancy changes timely into SMIS.

Report Parameters:

None

Report Detail (Fields):

See below for more details...

Report Layout:

Shelter Dashboard

This report is accessed through the left side Navigator and provides real-time occupancy information. The Reports icon at the top right will soon be deleted and all Shelter related reports will be accessed through the Shelter icon.

Occupancy			
Active intakes without admission	<i>This number represents all the active intakes that were entered at your shelter. All intakes that have been active for 18 hours or more and are not admitted to your shelter will expire at midnight each night.</i>	Vacancy	<i>This number represents funded capacity less the active admissions or occupancy of your shelter and cannot be negative.</i>
Referrals from other Shelters	<i>This number represents those referrals still in your queue from other</i>	Vacancy rate	<i>Vacancy divided by funded capacity</i>

	<i>shelters</i>		
Queue	<i>This number includes external referrals as well as internal intakes</i>	Current capacity	<i>The number represents active beds available in your shelter. This will not include any beds you have made unavailable, e.g. bed bugs, maintenance, etc. This number will be less than or equal to your space capacity</i>
Occupancy (active admissions)	<i>This number represents currently occupied beds</i>	Funded capacity	<i>As per Operating Agreement</i>
Occupancy rate	<i>100% minus the Vacancy rate</i>		

Bed Nights			
Yesterday	<i>Number of beds occupied as of 4:00 a.m. this morning represents the bed nights for yesterday</i>	Past 30 Days	<i>All occupied beds for the past 30 days up to yesterday (4:00 a.m. this morning)</i>
Current Month	<i>Includes the number of all occupied beds for the current month, up to 4:00 a.m. this morning</i>	Previous Month	<i>All occupied beds in the previous calendar month</i>

Incidents	
New incidents past 30 days	<i>All new incidents for the past 30 day that occurred by 4:00 a.m. this morning</i>
New incidents this calendar month	<i>All new incidents the current months that occurred by 4:00 a.m. this morning</i>
Open incidents	<i>This number represents all incidents that have not been concluded or closed. All incidents should be completed and closed through internal review and sign off procedure.</i>

Service Restrictions	<p><i>This report does not provide aggregate numbers. One restriction may be represented in more than one category. The duration will be recorded as the original duration applied at the time of recording the incidents. All incidents recorded up to 4:00 a.m. this morning will be included.</i></p> <p><i>You must notify and discuss all lengthy service restrictions with your Agency Review Officer at Hostel Services</i></p>						
Original duration of	1-7	8-14	15-30	31-60	61-90	91-180	180+

restriction (in days)							
New restrictions past 30 days							
New restrictions this calendar month							
Currently active							
Terminated early past 30 days							
Expired past 30 days							

Complaints			
New Complaints Past 30 Days			
New Complaints This Calendar Month			
Open Complaints (<30 Days Old)			
Open Complaints (30-60 Days Old)			
Open Complaints (>60 Days Old)			

Case Notes			
New Notes Past 30 Days			
New Notes This Calendar Month			
Incomplete Notes (<30 Days Old)			
Incomplete Notes (30-60 Days Old)			
Incomplete Notes (>60 Days Old)			

Print Options: Browser Print

Report Sample Screen:



Shelter:
User: Lee, Ben

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Testing.....

2 alerts

Birkdale Residence(53)
General
Dashboard
Statistics
Occupancy
Occupancy - Unique Clients
Client Services
Client Services - Unique Clients
Discharges
Discharges - Unique Clients

Shelter Dashboard - Birkdale Residence

[Back to Shelters](#)

Program Type

Occupancy

Active Intakes without Admission	0	Vacancy	0
Referrals from Other Shelters	0	Vacancy Rate	0%
Queue	0	Current Capacity	193
Occupancy(Active Admissions)	10	Funded Capacity	5
Occupancy Rate	200%		

Bed Nights

Yesterday	12	Past 30 Days	356
Current Month	0	Previous Month	356

Incidents

New Incidents Past 30 Days	1		
New Incidents This Calendar Month	0		
Open Incidents	2		

Service Restrictions

Original Duration of Restriction (in Days)	1 - 7	8 - 14	15 - 30	31 - 60	61 - 90	91 - 180	>180
Expired Next 30 Days	0	0	0	0	0	0	0
New Restrictions This Calendar Month	0	0	0	0	0	0	0
Expired Past 30 Days	0	0	0	0	0	0	0
Currently Active	0	0	0	0	0	0	0
New Restrictions Past 30 Days	0	0	0	0	0	0	0
Terminated Early Past 30 Days	0	0	0	0	0	0	0

New Incidents Past 30 Days	1		
New Incidents This Calendar Month	0		
Open Incidents	2		

Service Restrictions

Original Duration of Restriction (in Days)	1 - 7	8 - 14	15 - 30	31 - 60	61 - 90	91 - 180	>180
Expired Next 30 Days	0	0	0	0	0	0	0
New Restrictions This Calendar Month	0	0	0	0	0	0	0
Expired Past 30 Days	0	0	0	0	0	0	0
Currently Active	0	0	0	0	0	0	0
New Restrictions Past 30 Days	0	0	0	0	0	0	0
Terminated Early Past 30 Days	0	0	0	0	0	0	0

Complaints

New Complaints Past 30 Days	1		
New Complaints This Calendar Month	0		
Open Complaints (<30 Days Old)	1		
Open Complaints (30 - 60 Days Old)	0		
Open Complaints (>60 Days Old)	1		

Case Notes

New Notes Past 30 Days	2		
New Notes This Calendar Month	0		
Incomplete Notes (<30 Days Old)	0		
Incomplete Notes (30 - 60 Days Old)	0		
Incomplete Notes (>60 Days Old)	5		

29. Shelter Occupancy Screen

Report Category: Shelter

Access Via: Shelter Navigator

User Access Group: Supervisor & Manager roles

Description:

This Shelter based Occupancy screen shows statistics for new intakes, new admissions, discharges, accepted and rejected referrals to and from other Shelters, any stays . = 1 day and total bed nights for the Shelter. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Intake, Admission, Discharge, Referral and Stay is counted as 1 occurrence regardless of the number of family members present at the time of the action. The only exception is the Bed Nights row, for which each family member contributes to the count.

(Note that all Occupancy stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4.a.m. and update any occupancy changes timely into SMIS.)

All Stays are based upon the 4 a.m. threshold and are counted only if the client stays pass this time. However, Admissions stats does not require the client to stay pass the 4 a.m. threshold. For example, if a client is admitted at 11 p.m. and is discharged few hours later at 1 a.m., the new Intake, Admission and Discharge stats will increase its count by 1 respectively, but NOT the Stays count since the client did not stay passed the 4 a.m. threshold.

Report Parameters:

None

Report Detail (Fields):

Intakes	(number of new intakes within the column date range)
Admissions	(number of new admissions within the column date range)
Discharges	(number of discharges within the column date range)
Accepted Referrals From Other Shelters	(number of accepted referrals from other Shelters within the column date range)
Rejected Referrals From Other Shelters	(number of rejected referrals from other Shelters within the column date range)
Accepted Referrals To Other Shelters	(number of accepted referrals to other Shelters within the column date range)
Rejected Referrals To Other Shelters	(number of rejected referrals to other Shelters within the column date range)
Stays (>=1 day)	(number of client stays >= 1 day within the column date range, note that this would include clients who were already staying in the Shelter at the beginning of the date range)
Bed Nights	(number of total bed nights of all clients within the column date range)

	date range)
--	-------------

Print Options: Browser Print

Export Options: [Excel](#)

Report Layout:

Statistics – Shelter Name – Bedded Program

Should be run on the 1st of the month

Occupancy	As of 4:00 a.m. today = yesterdays statistics									
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	description
Intakes										New intakes entered within these dates = # of families
Admissions										New admissions within these dates
Discharges										New discharges within these dates
Accepted Referrals From Other Shelters										Accepted from the queue and referred from another Shelters within these dates
Rejected Referrals From Other Shelters										Rejected from the queue from another Shelters within these dates
Accepted Referrals To Other Shelters										Referrals to other Shelters that were accepted.

										<i>Could be a service (non-bedded) program within a Shelter</i>
Rejected Referrals To Other Shelters										<i>Referrals to other Shelters that were rejected. Could be a service (non-bedded) program within a Shelter</i>
Stays (>=1 day)										<i>Includes all family or single client stays who stayed at least 1 day after admission into the program</i>
Bednights										<i># of individuals bed nights</i>

Report Sample Screen:


 Shelter:
 User: Lee, Ben

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[My Tasks](#)
[Reports](#)
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[Program](#)
[Facility](#)
[Shelter](#)
[Administration](#)

Testing....

Statistics - Birkdale Residence

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[Export to Excel](#)

Occupancy

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Intakes	0	0	0	1	1	0	6	7	31
Admissions	0	0	0	1	1	0	6	7	29
Discharges	0	1	1	0	1	1	3	4	32
Accepted Referrals From Other Shelters	0	0	0	0	0	0	0	0	1
Rejected Referrals From Other Shelters	0	0	0	0	0	0	0	0	0
Accepted Referrals To Other Shelters	0	0	0	0	0	0	0	0	0
Rejected Referrals To Other Shelters	0	0	0	0	0	0	0	0	1
Stays (>= 1day)	6	0	6	6	6	6	5	6	11
Bed Nights	12	0	295	356	356	865	549	905	3224

30. Shelter Occupancy – Unique Clients Screen

Report Category: Shelter

Access Via: Shelter Navigator

User Access Group: Supervisor & Manager roles

Description:

This Shelter based Occupancy screen shows statistics for total number of unique clients with new intakes, new admissions, discharges, accepted and rejected referrals to and from other Shelters, any stays . = 1 day and total bed nights for the Shelter for the various date ranges. For example, if a client has 2 "new" intakes during the column period, then it is counted as 1 unique client intake only. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family*, each Intake, Admission, Discharge, Referral and Stay, each unique family member is counted individually when present at the time of the action. However, if a family member is part of two different family intakes, admission or other actions during 1 single reporting date range, then he/she is counted as 1 unique individual on this screen.

(Note that all Occupancy stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4.a.m. and update any occupancy changes timely into SMIS.)

All Stays are based upon the 4 a.m. threshold and are counted only if the client stays pass this time. However, Admissions stats does not require the client to stay pass the 4 a.m. threshold. For example, if a client is admitted at 11 p.m. and is discharged few hours later at 1 a.m., the new Intake, Admission and Discharge stats will increase its count by 1 respectively, but NOT the Stays count since the client did not stay passed the 4 a.m. threshold.

Report Parameters:

None

Report Detail (Fields):

Intakes	(number of unique clients with new intakes within the column date range)
Admissions	(number of unique clients with new admissions within the column date range)
Discharges	(number of unique clients with discharges within the column date range)
Accepted Referrals From Other Shelters	(number of accepted referrals of unique clients from other Shelters within the column date range)
Rejected Referrals From Other Shelters	(number of rejected referrals of unique clients from other Shelters within the column date range)
Accepted Referrals To Other Shelters	(number of accepted referrals of unique clients to other Shelters within the column date range)

Rejected Referrals To Other Shelters	(number of rejected referrals of unique clients to other Shelters within the column date range)
Stays (>=1 day)	(number of unique client stays >= 1 day within the column date range, note that this would include unique clients who were already staying in the Shelter at the beginning of the date range)

Print Options: Browser Print

Export Options: [Excel](#)

Report Layout:

Statistics – Shelter Name – Bedded program

Should be run on the 1st of the month

Occupancy – Unique Clients										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	= unique individuals
Intakes										New intakes entered within these date(s)
Admissions										New admissions within these date(s)
Discharges										New discharges within these date(s)
Accepted Referrals From Other Shelters										Accepted from the queue and referred from another shelter within these

										<i>date(s)</i>
Rejected Referrals From Other Shelters										<i>Rejected from the queue from another shelter within these date(s)</i>
Accepted Referrals To Other Shelters										<i>Referrals to other shelters that were accepted. Could be a service (non-bedded) program within the other shelter</i>
Rejected Referrals To Other Shelters										<i>Referrals to other shelters that were rejected. Could be a service (non-bedded) program within the other shelter</i>
Stays (>= 1 Day)										<i># of unique individuals with Stays at least 1 day after admission into the shelter</i>

Report Sample Screen:

toronto SMIS Shelter: User: Lee, Ben

Home My Tasks Reports Help Logout

Client Program Facility Shelter Administration

Testing....

Statistics - Birkdale Residence

Back to Shelters Export to Excel

Occupancy - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Intakes	0	0	0	2	2	0	7	9	22
Admissions	0	0	0	2	2	0	7	9	20
Discharges	0	2	1	0	2	1	3	5	26
Accepted Referrals From Other Shelters	0	0	0	0	0	0	0	0	1
Rejected Referrals From Other Shelters	0	0	0	0	0	0	0	0	0
Accepted Referrals To Other Shelters	0	0	0	0	0	0	0	0	0
Rejected Referrals To Other Shelters	0	0	0	0	0	0	0	0	1
Stays (>= 1day)	12	0	10	12	12	10	10	12	18

31. Shelter Client Services Screen

Report Category: Shelter

Access Via: Shelter Navigator

User Access Group: Supervisor & Manager roles

Description:

This Shelter based Client Services screen shows counts of new incidents, new service restrictions, new complaints and new case notes for the Shelter for various time frames. These stats can also be exported to Microsoft Excel format.

(Note that all Client Services stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

For example, if a new Case Note is written for a Client at 3 p.m. yesterday and another new Note written at 2 a.m. early today, they are both counted as for yesterday's business day.

Report Parameters:

None

Report Detail (Fields):

New Incidents	total number of new incidents recorded during the column date period)
New Service Restrictions	(total number of new service restrictions created during the column date period)
New Complaints	(total number of new complaints records during the column date period)
New Case Notes	(total number of new case notes created during the column date period)

Print Options: Browser Print

Export Options: [Excel](#)

Report Layout:

Statistics – Shelter Name – Bedded Program

Should be run on the 1st of the month

Client Services										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>Not unique clients = same client could have multiple entries</i>
New incidents										<i>Only the incidents newly occurred in this period</i>
New service restrictions										<i>Only the S.R. new in this period</i>
New complaints										<i>Only the complaints new in this period</i>
New case notes										<i>Only the case notes new in this period</i>

Report Sample Screen:



Shelter:
User: Lee, Ben

[Home](#)
[My Tasks](#)
[Reports](#)
[Help](#)
[Logout](#)

[Client](#)
[Program](#)
[Facility](#)
[Shelter](#)
[Administration](#)

Testing....

Navigator
2 alerts
Birkdale Residence(53)
General
Dashboard
Statistics
Occupancy
Occupancy - Unique Clients
Client Services
Client Services - Unique Clients
Discharges
Discharges - Unique Clients

Statistics - Birkdale Residence
[Back to Shelters](#)
[Export to Excel](#)

Client Services

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Incidents	0	0	0	1	1	0	0	1	1
New Service Restrictions	0	1	0	2	3	0	1	4	0
New Complaints	0	0	0	1	1	0	0	1	2
New Case Notes	0	0	4	2	2	5	3	5	7

32. Shelter Client Services – Unique Clients Screen – All Program

Report Category: Shelter

Access Via: Shelter Navigator

User Access Group: Supervisor & Manager roles

Description:

This Shelter based Client Services screen shows total number of unique clients involved in new incidents, new service restrictions, new complaints and new case notes for the Shelter for various time frames. These stats can also be exported to Microsoft Excel format.

(Note that all Client Services stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

For example, if a new Case Note is written for a Client at 3 p.m. yesterday and another new Note written for a different Client at 2 a.m. early today, they are both counted as for yesterday's business day. However, if the 2nd Note was written for the same Client, then yesterday's count will only increase by 1 as this screen shows Unique Client counts during a date period.

Report Parameters:

None

Report Detail (Fields):

New Incidents	total number of unique clients involved in new incidents recorded during the column date period)
New Service Restrictions	(total number of unique clients given new service restrictions created during the column date period)
New Complaints	(total number of unique clients relating to new complaints records during the column date period)
New Case Notes	(total number of unique clients for which new case notes were created during the column date period)

Print Options: Browser Print

Export Options: MS Excel

Report Layout:

Statistics – Shelter Name – Bedded Program

Should be run on the 1st of the month

Client services – unique clients										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>not the total number of I.R./S.R./complaints/ case notes</i>
New Incidents										<i># of unique clients with new incidents occurred in this period</i>
New Service Restrictions										<i># of unique clients with S.R. entered this period</i>
New Complaints										<i># of unique clients with complaint entered this period</i>
New Case Notes										<i># of unique clients with case notes entered this period</i>

Report Sample Screen:



Shelter:
User: Lee, Ben

[Home](#)
[My Tasks](#)
[Reports](#)
[Help](#)
[Logout](#)

[Client](#)
[Program](#)
[Facility](#)
[Shelter](#)
[Administration](#)

Cold Weather Alert is ON

Testing...

Navigator

2 alerts

Birkdale Residence(53)

- General
- Dashboard
- Statistics
 - Occupancy
 - Occupancy - Unique Clients
 - Client Services
 - Client Services - Unique Clients**
 - Discharges
 - Discharges - Unique Clients

Statistics - Birkdale Residence

[Back to Shelters](#)
[Export to Excel](#)

Client Services - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Incidents	0	0	0	1	1	0	0	1	2
New Service Restrictions	0	1	0	2	3	0	1	4	0
New Complaints	0	0	0	1	1	0	0	1	2
New Case Notes	0	0	2	1	1	2	2	3	3

33. Shelter Discharge Screen – All Programs

Report Category: Shelter

Access Via: Shelter Navigator

User Access Group: Supervisor & Manager roles

Description:

This Shelter based Discharge screen shows counts of various discharge dispositions for the Shelter for various time frames. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Discharge, it is counted as 1 occurrence regardless of the number of family members present at the time of the discharge. However, if a single client or family is discharged more than once during any column date period, each discharge occurrence is counted regardless if it's the same or different disposition or reason.

For example, if a single client was discharge on the 2nd day of the month, and re-admitted and discharged in the middle of the same month and for the same discharge disposition but different discharge reasons, then he/she is counted twice for that month's discharge disposition count, and counted once for each of the two different monthly count of discharge reasons.

(Note that all Discharge stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

Report Parameters:

None

Report Detail (Fields):

Custody	(total number of client discharges to custody within the column date period)
Detox	(total number of client discharges to detox within the column date period)
Escorted off premises	(total number of clients escorted off premises upon discharge within the column date period)
Hospital	(total number of client discharges to hospital within the column date period)
Housing	(total number of client discharges to housing within the column date period)
Other	(total number of client discharges to other dispositions within the column date period)
Other Hostels	(total number of client discharges to other hostels within the column date period)
Unknown	(total number of client discharges to unknown dispositions within the column date period)

Print Options: Browser Print

Export Options: [Excel](#)

Report Layout:

Statistics – Shelter Name – Bedded Program

Should be run on the 1st of the month

Discharge		Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Could be the same person more than once
Custody											# of discharges to custody
Detox											# of discharges made to detox
Escorted off premises											# of discharges escorted off premises
Hospital											# of discharges to hospital

Housing										<i># of discharges to housing</i>
Other										<i># of discharges to Other but unidentified dispositions</i>
Other Hostel										<i># of discharges to another Shelter Program</i>
Unknown										<i># of discharges to Unknown dispositions</i>


This section includes aggregate data for each discharge reason, and may include the same individual discharged various times for the same or different reasons. This list represents each individual discharge according to discharge reason that is entered into SMIS.
The last three underlined reasons are new.

Discharge Reasons										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>Not unique clients = same client could have multiple entries, families are counted as one family head</i>
New Address – Private Housing										
New Address – Transitional Housing										
New Address – Subsidized Housing										
Returned to Previous Address										

Reunited with family/friends										
Detox										
Residential Treatment Program										
Long-Term Care Facility										
Left the City										
Hospitalized										
Incarcerated										
Decided to leave										
Failed to return										
Not following case plan										
Not participating in case planning										
Repeated rule violations										
Disruptive rule violations										
Disruptive behaviour										
Violent or threatening behaviour										
Health & Safety of residents, volunteers or staff										
Assault of residents, volunteers or staff										
Wielding weapons or dangerous objects										
Possession of firearms										

Possession of illegal substances/contraband										
Trafficking in illegal drugs										
Other										
<u>Automatic discharge – client admitted to another program</u>										
<u>Daily discharge</u>										This is a reason unique to only a few Programs that are closed during certain hours and require all individuals to leave the Program at that time.
<u>Death</u>										

Report Sample Screen:



Shelter:
User: Lee, Ben

[Home](#) [My Tasks](#) [Reports](#) [Administration](#) [Help](#) [Logout](#)
[Client](#) [Program](#) [Facility](#) [Shelter](#) [Head Office](#)

Navigator

- Birkdale Residence(53)
 - General
 - Dashboard
 - Statistics
 - Occupancy
 - Occupancy - Unique Clients
 - Client Services
 - Client Services - Unique Clients
 - Discharges**
 - Discharges - Unique Clients
 - Reports
 - Client Report
 - Client Intake Report
 - Client Occupancy Report
 - Client Discharge Report
 - Occupancy Report
 - Service Restriction Report
 - [+] Financial

Statistics - Birkdale Residence

[Back to Shelters](#)
[Export to Excel](#)

Discharge Dispositions

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Custody	0	0	1	0	0	3	0	1	4
Detox	0	0	1	0	0	5	0	0	7
Escorted off premises	0	0	0	0	0	5	0	1	8
Hospital	0	0	0	0	0	1	0	0	1
Housing	0	0	0	0	0	5	0	2	7
Other	0	0	0	1	0	5	1	2	6
Other Hostel	0	0	1	1	0	2	1	1	2
Unknown	0	0	0	0	0	8	0	0	8

Discharge Reasons

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Address - Private Housing	0	0	7	0	0	7	0	3	11
New Address - Transitional Housing	0	0	1	0	0	7	0	0	9
New Address - Subsidized Housing	0	0	0	0	0	1	0	0	3
Returned To Previous Address	0	0	0	0	0	3	0	0	3
Reunited with family/friends	0	0	0	0	0	1	0	0	1
Detox	0	0	1	0	0	2	0	0	2
Residential treatment program	0	0	0	0	0	0	0	0	0

Long-term care facilities	0	0	0	0	0	0	0	0	0
Left The City	0	0	1	0	0	1	0	0	1
Hospitalized	0	0	0	0	0	0	0	0	0
Incarcerated	0	0	0	0	0	0	0	0	0
Decided to leave	0	0	0	0	0	1	0	0	2
Failed to return	0	0	0	0	0	0	0	0	0
Not following case plan	0	0	0	0	0	1	0	0	1
Not participating in case planning	0	0	0	0	0	0	0	0	0
Repeated rule violations	0	0	0	0	0	0	0	0	0
Disruptive behaviour	0	0	1	0	0	2	0	0	2
Violent or threatening behaviour	0	0	0	0	0	0	0	0	0
Health & Safety of residents, volunteers or staff	0	0	0	0	0	0	0	0	0
Assault of residents, volunteers or staff	0	0	0	0	0	0	0	1	0
Wielding weapons or dangerous objects	0	0	0	0	0	0	0	0	0
Possession of firearms	0	0	0	0	0	0	0	0	0
Possession of illegal substances/contraband	0	0	0	0	0	0	0	0	0
Trafficking in illegal drugs	0	0	0	0	0	0	0	0	0
Other	0	0	6	0	0	6	0	0	6
Automatic discharge - Client admitted to another program	0	0	1	2	0	1	2	3	1
Daily Discharge	0	0	1	0	0	1	0	0	1
Death	0	0	0	0	0	0	0	0	0

34. Shelter Discharge – Unique Clients Screen – All Program

Report Category: Shelter

Access Via: Shelter Navigator

User Access Group: Supervisor & Manager roles

Description:

This Shelter based Discharge screen shows counts unique clients for various discharge dispositions for the Shelter during the various time frames. For example, if a client is discharge twice from two admissions during a column date period, then it is counted as 1 unique client discharge. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Discharge, each unique family member is counted individually when present at the time of the action. However, if a family member is part of two different family discharges during the same reporting date period (i.e. column cell), then he/she is counted as only 1 unique individual on this screen. Also, if a single client is discharged more than once during any column date period, the count only increments by 1.

For example, if a single client was discharge on the 2nd day of the month, and re-admitted and discharged in the middle of the same month and for the same discharge disposition but different discharge reasons, then he/she is counted only once for that month's discharge disposition count, but is counted once for each of the two different monthly count of discharge reasons.

(Note that all Discharge stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

Report Parameters:

None

Report Detail (Fields):

Custody	(total number of unique client (single or individual family member) discharges to custody within the column date period)
Detox	(total number of client discharges to detox within the column date period)
Escorted off premises	(total number of unique clients escorted off premises upon discharge within the column date period)
Hospital	(total number of unique client discharges to hospital within the column date period)
Housing	(total number of unique client discharges to housing within the column date period)
Other	(total number of unique client discharges to other dispositions within the column date period)
Other Hostels	(total number of unique client discharges to other hostels within the column date period)
Unknown	(total number of unique client discharges to unknown dispositions within the column date period)

	column date period)	
--	---------------------	--

Print Options: Browser Print

Export Options: [Excel](#)

Report Layout:

Statistics – Shelter Name – Bedded Program

Should be run on the 1st of the month

Discharge Disposition – Unique Clients										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Unique individuals per discharge reason regardless of the # of times
Custody										# of clients discharged to custody
Detox										# of clients discharged to detox
Escorted off premises										# of clients discharged and escorted off premises
Hospital										# of clients discharged to hospital
Housing										# of clients discharged to housing
Other										Includes all unique client discharges for unidentified dispositions.
Other Hostel										Includes all unique client discharges to another shelter. This would include all automatic discharges as a

										<i>result of the individual being admitted to another shelter</i>
Unknown										<i>Includes all unique client discharges to unknown disposition (usually a fail-to-return).</i>

This section includes aggregate data for each discharge reason, and may include the same individual discharged various times for the same or different reasons. This list represents each individual discharge according to discharge reason that is entered into SMIS.


The last three underlined reasons are new.

Discharge Reasons										
	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>Not unique clients = same client could have multiple entries, families are counted as one family head</i>
New Address – Private Housing										
New Address – Transitional Housing										
New Address – Subsidized Housing										
Returned to Previous Address										
Reunited with family/ Friends										
Detox										
Residential Treatment Program										

Long-Term Care Facility										
Left the City										
Hospitalized										
Incarcerated										
Decided to leave										
Failed to return										
Not following case plan										
Not participating in case planning										
Repeated rule violations										
Disruptive rule violations										
Disruptive behaviour										
Violent or threatening behaviour										
Health & Safety of residents, volunteers or staff										
Assault of residents, volunteers or staff										
Wielding weapons or dangerous objects										
Possession of firearms										
Possession of illegal substances/ contraband										
Trafficking in illegal drugs										
Other										
Automatic										

<u>discharge – client admitted to another program</u>										
<u>Daily discharge</u>										This is a reason unique to only a few Programs that are closed during certain hours and require all individuals to leave the Program at that time.
<u>Death</u>										

Report Sample Screen:



Shelter: Home My Tasks Reports Administration Help Logout

User: Lee, Ben

Client
Program
Facility
Shelter
Head Office

Navigator

Birkdale Residence(53)

- General
- Dashboard
- Statistics
 - Occupancy
 - Occupancy - Unique Clients
 - Client Services
 - Client Services - Unique Clients
 - Discharges
 - Discharges - Unique Clients**
- Reports
 - Client Report
 - Client Intake Report
 - Client Occupancy Report
 - Client Discharge Report
 - Occupancy Report
 - Service Restriction Report
 - [+] Financial

Statistics - Birkdale Residence

[Back to Shelters](#) [Export to Excel](#)

Discharge Dispositions - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Custody	0	0	2	0	0	3	0	1	4
Detox	0	0	2	0	0	3	0	0	5
Escorted off premises	0	0	0	0	0	1	0	1	4
Hospital	0	0	0	0	0	1	0	0	1
Housing	0	0	2	0	0	3	0	2	5
Other	0	0	4	1	0	5	1	1	6
Other Hostel	0	0	2	1	0	2	1	1	2
Unknown	0	0	6	0	0	7	0	0	7

Discharge Reasons - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Address - Private Housing	0	0	6	0	0	6	0	3	10
New Address - Transitional Housing	0	0	1	0	0	2	0	0	4
New Address - Subsidized Housing	0	0	0	0	0	1	0	0	3
Returned To Previous Address	0	0	0	0	0	1	0	0	1
Reunited with family/friends	0	0	0	0	0	1	0	0	1
Detox	0	0	1	0	0	2	0	0	2
Residential treatment program	0	0	0	0	0	0	0	0	0

Long-term care facilities	0	0	0	0	0	0	0	0	0
Left The City	0	0	1	0	0	1	0	0	1
Hospitalized	0	0	0	0	0	0	0	0	0
Incarcerated	0	0	0	0	0	0	0	0	0
Decided to leave	0	0	0	0	0	1	0	0	2
Failed to return	0	0	0	0	0	0	0	0	0
Not following case plan	0	0	0	0	0	1	0	0	1
Not participating in case planning	0	0	0	0	0	0	0	0	0
Repeated rule violations	0	0	0	0	0	0	0	0	0
Disruptive behaviour	0	0	1	0	0	2	0	0	2
Violent or threatening behaviour	0	0	0	0	0	0	0	0	0
Health & Safety of residents, volunteers or staff	0	0	0	0	0	0	0	0	0
Assault of residents, volunteers or staff	0	0	0	0	0	0	0	1	0
Wielding weapons or dangerous objects	0	0	0	0	0	0	0	0	0
Possession of firearms	0	0	0	0	0	0	0	0	0
Possession of illegal substances/contraband	0	0	0	0	0	0	0	0	0
Trafficking in illegal drugs	0	0	0	0	0	0	0	0	0
Other	0	0	6	0	0	6	0	0	6
Automatic discharge - Client admitted to another program	0	0	1	2	0	1	2	2	1
Daily Discharge	0	0	1	0	0	1	0	0	1
Death	0	0	0	0	0	0	0	0	0

35. SMIS - Login Logging

Report Category: System Administration

Access Via: Administration

User Access Group: System Administrator

Description:

This User Login Logging Report showing the Date & Time a User login and logout of a Shelter within SMIS. These stats can also be exported to Microsoft Excel format.

Report Parameters:

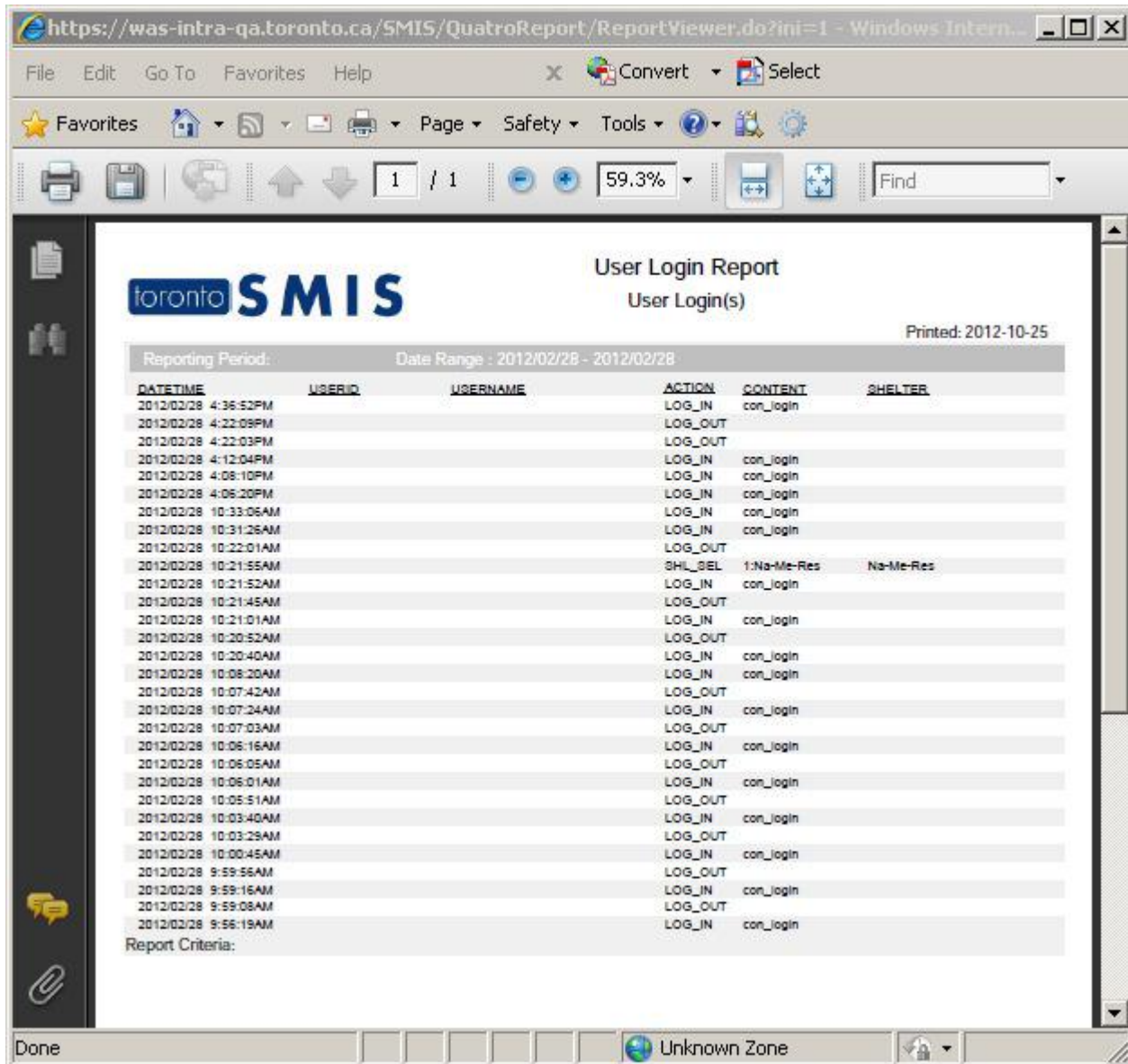
None

Report Detail (Fields):

<u>DATETIME</u>	(the date and time of the action)
<u>USERID</u>	(the userid that performed the action)
<u>USERNAME</u>	(the user name that performed the action)
<u>ACTION</u>	(the type of action performed: <i>LOG_IN, LOG_OUT</i>)
<u>CONTENT</u>	(the content viewed or changed)
<u>SHELTER</u>	(the shelter logged into when applicable, blank if login at higher ORG level)

Print Options: PDF

Report Sample Screen:



https://was-intra-qa.toronto.ca/SMIS/QuatroReport/ReportViewer.do?ini=1 - Windows Intern...

File Edit Go To Favorites Help X Convert Select

Favorites Home RSS Print Page Safety Tools ? Find

1 / 1 59.3% Find

toronto SMIS User Login Report
User Login(s) Printed: 2012-10-25

Reporting Period: Date Range : 2012/02/28 - 2012/02/28

DATETIME	USERID	USERNAME	ACTION	CONTENT	SHELTER
2012/02/28 4:36:52PM			LOG_IN	con_login	
2012/02/28 4:22:09PM			LOG_OUT		
2012/02/28 4:22:03PM			LOG_OUT		
2012/02/28 4:12:04PM			LOG_IN	con_login	
2012/02/28 4:08:10PM			LOG_IN	con_login	
2012/02/28 4:06:20PM			LOG_IN	con_login	
2012/02/28 10:33:06AM			LOG_IN	con_login	
2012/02/28 10:31:26AM			LOG_IN	con_login	
2012/02/28 10:22:01AM			LOG_OUT		
2012/02/28 10:21:55AM			SHL_SEL	1:Na-Me-Res	Na-Me-Res
2012/02/28 10:21:52AM			LOG_IN	con_login	
2012/02/28 10:21:45AM			LOG_OUT		
2012/02/28 10:21:01AM			LOG_IN	con_login	
2012/02/28 10:20:52AM			LOG_OUT		
2012/02/28 10:20:40AM			LOG_IN	con_login	
2012/02/28 10:08:20AM			LOG_IN	con_login	
2012/02/28 10:07:42AM			LOG_OUT		
2012/02/28 10:07:24AM			LOG_IN	con_login	
2012/02/28 10:07:03AM			LOG_OUT		
2012/02/28 10:06:16AM			LOG_IN	con_login	
2012/02/28 10:06:05AM			LOG_OUT		
2012/02/28 10:06:01AM			LOG_IN	con_login	
2012/02/28 10:05:51AM			LOG_OUT		
2012/02/28 10:03:40AM			LOG_IN	con_login	
2012/02/28 10:03:29AM			LOG_OUT		
2012/02/28 10:00:45AM			LOG_IN	con_login	
2012/02/28 9:59:56AM			LOG_OUT		
2012/02/28 9:59:16AM			LOG_IN	con_login	
2012/02/28 9:59:08AM			LOG_OUT		
2012/02/28 9:56:19AM			LOG_IN	con_login	

Report Criteria:

Done Unknown Zone

36. Program Financial Report – All Programs

Report Category: Program

Access Via: Program Navigator - Financial

User Access Group: All Program Users who has access to SMIS Financials

Description:

The Program based report shows the summary and details of all financial transactions for a specified date range. The default date range is today only. The beginning of the report also displays Program profile information.

Report Parameters:

Start Date (report start date, default is today)

End Date (report to date, default is today)

No Maximum Report Date Range

Report Detail (Fields):

Disbursement Type Summary Block

Disb. Type	(disbursement type: <i>Client Safekeeping, Food Allowance, Personal Needs Allowance</i>)
Amount	(subtotal for each disbursement type for the specified date range)
View By	(user specified further financial details to display:
Date	<i>day-by-day breakdown of the disbursement type financial details,</i>
Client	<i>client-by-client breakdown of the disbursement type financial details,</i>
Detail	<i>most detailed breakdown of the disbursement type financial sub-transaction details,</i>
Total >Detail	<i>give detailed breakdown by complete transactions including all disbursement types</i>

[Note that for each Disbursement Type, a user can further select a View By Date, Client or Detail breakdown of the transactions. And for Total of all Disbursement Types, a user can select Detail view of complete transactions (where each transaction displayed then may contain multiple disbursement types) User can also select to view transactions by disbursement type, date or all details done by each user separately.]

Cash vs. Cheque Summary Block

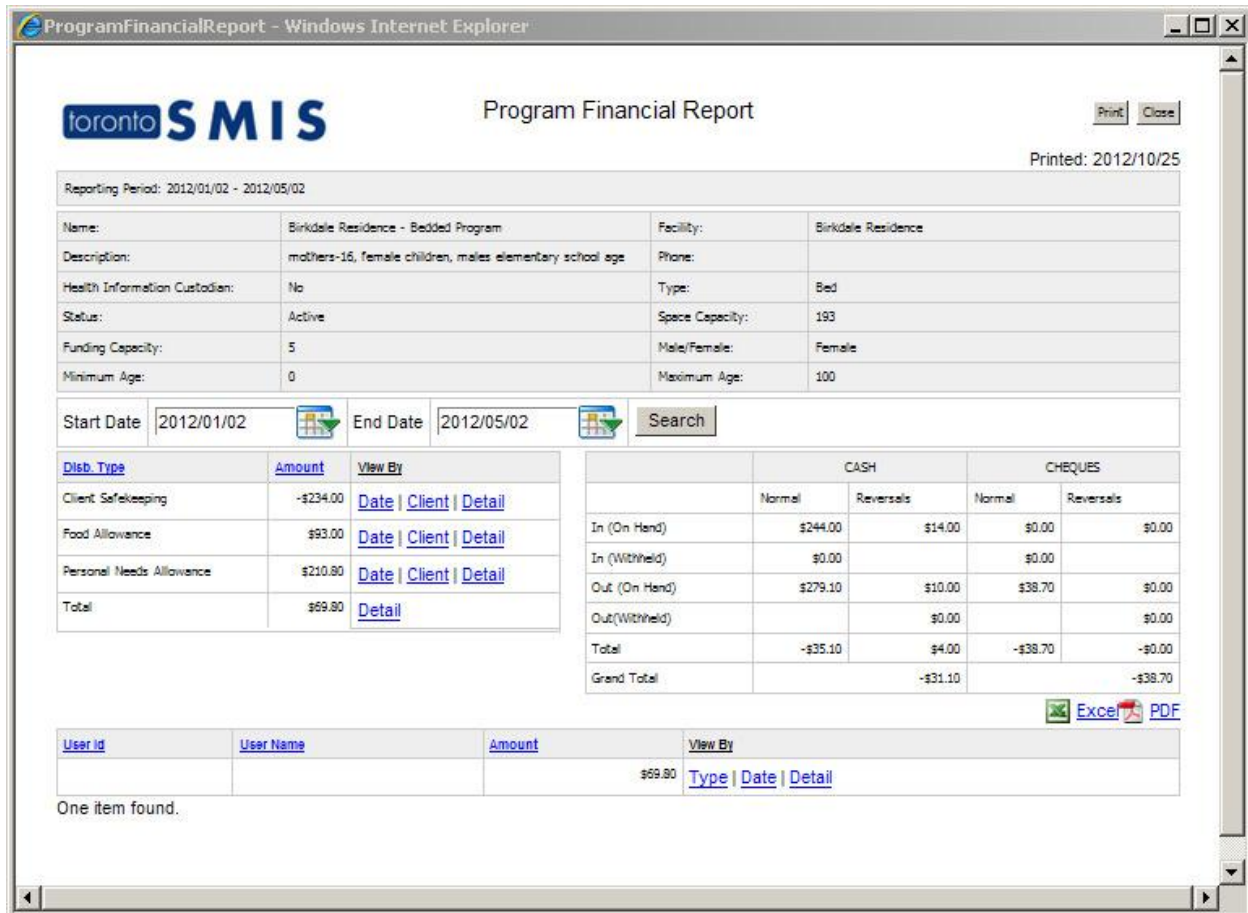
CASH	(all cash related transaction subtotals)
CHEQUES	(all issued cheque related transaction subtotals)
Normal	(all non-reversal type transactions involving money)
Reversal	(all reversal type transactions involving money)
In (On Hand)	(all incoming moneys to the Program)
In (Withheld)	(all withheld moneys from clients to the Program)
Out (On Hand)	(all outflow of moneys from the Program)

Detailed Table

Date	(Date of transaction)
Disb. Type	(disbursement type: <i>Client Safekeeping, Food Allowance, Personal Needs Allowance</i>)
CSF Type	(client safekeeping fund type: <i>Deposit [Cash], Withdraw, Deposit [Cheque]</i>)
Amount	(the \$ amount of the (sub-)transaction)
User Name	(name of the user who processed the transaction)
Trans. Type	(transaction type: <i>Regular, Allowance Override, Not To Be Paid, Reverse</i>)
Paid By	(payment vehicle: <i>CASH, CHEQUE [cheque #], blank if not money related transaction</i>)
ID	(transaction ID)
Client ID	(SMIS Client ID)
Client Name	(Client last name, then first name)

Export Options: [Excel](#), [PDF](#)

Report Sample Screens:



Program Financial Report

Printed: 2012/10/25

Reporting Period: 2012/01/02 - 2012/05/02

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Start Date: 2012/01/02 End Date: 2012/05/02 Search

Disb. Type	Amount	View By
Client Safekeeping	-\$234.00	Date Client Detail
Food Allowance	\$93.00	Date Client Detail
Personal Needs Allowance	\$210.90	Date Client Detail
Total	\$69.90	Detail

	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$244.00	\$14.00	\$0.00	\$0.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$279.10	\$10.00	\$38.70	\$0.00
Out (Withheld)		\$0.00		\$0.00
Total	-\$35.10	\$4.00	-\$38.70	-\$0.00
Grand Total		-\$31.10		-\$38.70


[Excel](#) [PDF](#)

User Id	User Name	Amount	View By
		\$69.90	Type Date Detail

One item found.

Financial Report (Initial Summary Screen)

ProgramFinancialSummaryReport - Windows Internet Explorer



Program Financial Summary Report
 Type Date

[Print](#) [Return](#)

Printed: 2012/10/25

Reporting Period: 2012/01/02 - 2012/05/02

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Spec Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Disb. Type	Amount	CASH		CHEQUES	
		Normal	Reversals	Normal	Reversals
Personal Needs Allowance	\$210.80				
Total	\$210.80				


	Normal	Reversals	Normal	Reversals
In (On Hand)	\$0.00	\$0.00	\$0.00	\$0.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$172.10	\$0.00	\$38.70	\$0.00
Out(Withheld)		\$0.00		\$0.00
Total	-\$172.10	-\$0.00	-\$38.70	-\$0.00
Grand Total		-\$172.10		-\$38.70

[Excel](#) [PDF](#)

Date	Disb. Type	Amount
2012/04/10	Personal Needs Allowance	\$38.70
2012/04/18	Personal Needs Allowance	\$172.10
2012/05/02	Personal Needs Allowance	\$0.00

Program Financial Summary Report for Disbursement Type PNA view by *Date*

ProgramFinancialSummaryReport - Windows Internet Explorer



Program Financial Summary Report
 Type Client

[Print](#)
[Return](#)

Printed: 2012/10/25

Reporting Period: 2012/01/02 - 2012/05/02

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Spec Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Disb. Type	Amount
Personal Needs Allowance	\$210.80
Total	\$210.80


	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$0.00	\$0.00	\$0.00	\$0.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$172.10	\$0.00	\$38.70	\$0.00
Out(Withheld)		\$0.00		\$0.00
Total	-\$172.10	-\$0.00	-\$38.70	-\$0.00
Grand Total		-\$172.10		-\$38.70

[Excel](#)
[PDF](#)

Disb. Type	Amount	Client id	Client Name
Personal Needs Allowance	\$137.70		
Personal Needs Allowance	\$73.10		

Program Financial Summary Report for Disbursement Type PNA view by *Client*

ProgramFinancialDetailReport - Windows Internet Explorer



Program Financial Detail Report

Type Detail

[Print](#)
[Return](#)

Printed: 2012/10/25

Reporting Period: 2012/01/02 - 2012/05/02

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Spec Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Disb. Type	Amount
Personal Needs Allowance	\$210.80
Total	\$210.80


	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$0.00	\$0.00	\$0.00	\$0.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$172.10	\$0.00	\$38.70	\$0.00
Out(Withheld)		\$0.00		\$0.00
Total	-\$172.10	-\$0.00	-\$38.70	-\$0.00
Grand Total		-\$172.10		-\$38.70

[Excel](#) [PDF](#)

Date	Disb. Type	CSF Type	Amount	User Name	Trans. Type	Paid By	ID	Client Id	Client Name
2012/04/10	Personal Needs Allowance		\$38.70		Regular	CHEQUE []			
2012/04/18	Personal Needs Allowance		\$73.10		Regular	CASH			
2012/04/18	Personal Needs Allowance		\$99.00		Allowance Override	CASH			
2012/05/02	Personal Needs Allowance		\$0.00		Not To Be Paid				

Program Financial Summary Report for Disbursement Type PNA viewing full *Detail*

ProgramFinancialDetailReport - Windows Internet Explorer



Program Financial Detail Report

Transaction Detail

[Print](#)
[Return](#)

Printed: 2012/10/25

Reporting Period: 2012/01/02 - 2012/05/02

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Spec Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Disb. Type	Amount	CASH		CHEQUES	
		Normal	Reversals	Normal	Reversals
Client Safekeeping	- \$234.00				
Food Allowance	\$93.00				
Personal Needs Allowance	\$210.80				
Total	\$69.80				


	Normal	Reversals	Normal	Reversals
In (On Hand)	\$244.00	\$14.00	\$0.00	\$0.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$279.10	\$10.00	\$38.70	\$0.00
Out (Withheld)		\$0.00		\$0.00
Total	-\$35.10	\$4.00	-\$38.70	-\$0.00
Grand Total		-\$31.10		-\$38.70

[Excel](#) [PDF](#)

Date	Amount	User Name	Trans. Type	Paid By	ID	Client Id	Client Name
2012/03/22	\$9.00		Allowance Override	CASH			
2012/04/10	\$(150.00)		Regular	CASH			
2012/04/10	\$38.70		Regular	CHEQUE [434345]			
2012/04/10	\$(50.00)		Regular	CASH			
2012/04/18	\$14.00		Regular	CASH			
2012/04/18	\$123.10		Regular	CASH			
2012/04/18	\$99.00		Allowance Override	CASH			
2012/05/02	\$10.00		Reverse	CASH			
2012/05/02	\$(14.00)		Reverse	CASH			
2012/05/02	\$(10.00)		Regular	CASH			
2012/05/02	\$0.00		Not To Be Paid				

Program Financial Summary Report for Total of all Disbursement Types viewing full *Transaction Details*

ProgramFinancialSummaryReport - Windows Internet Explorer



Program Financial Summary Report

User Type

[Print](#)
[Return](#)

Printed: 2012/10/25

Reporting Period: 2012/01/02 - 2012/05/02

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Spec Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Disb. Type	Amount	CASH		CHEQUES	
		Normal	Reversals	Normal	Reversals
Client Safekeeping	-\$234.00				
Food Allowance	\$93.00				
Personal Needs Allowance	\$210.80				
Total	\$69.80				


	Normal	Reversals	Normal	Reversals
In (On Hand)	\$244.00	\$14.00	\$0.00	\$0.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$279.10	\$10.00	\$38.70	\$0.00
Out (Withheld)		\$0.00		\$0.00
Total	-\$35.10	\$4.00	-\$38.70	-\$0.00
Grand Total		-\$31.10		-\$38.70

[Excel](#) [PDF](#)

User Name	Disb. Type	Amount
	Client Safekeeping	\$(234.00)
	Food Allowance	\$93.00
	Personal Needs Allowance	\$210.80

Program Financial Summary Report by User and Disbursement Type

ProgramFinancialSummaryReport - Windows Internet Explorer



Program Financial Summary Report
 User Date

[Print](#) [Return](#)

Printed: 2012/10/25

Reporting Period: 2012/01/02 - 2012/05/02

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Spec Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Disb. Type	Amount	CASH		CHEQUES	
		Normal	Reversals	Normal	Reversals
Client Safekeeping	-\$234.00				
Food Allowance	\$93.00				
Personal Needs Allowance	\$210.80				
Total	\$69.80				


	Normal	Reversals	Normal	Reversals
In (On Hand)	\$244.00	\$14.00	\$0.00	\$0.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$279.10	\$10.00	\$38.70	\$0.00
Out (Withheld)		\$0.00		\$0.00
Total	-\$35.10	\$4.00	-\$38.70	-\$0.00
Grand Total		-\$31.10		-\$38.70

[Excel](#) [PDF](#)

User Name	Date	Amount
	2012/03/22	\$9.00
	2012/04/10	\$(161.30)
	2012/04/18	\$236.10
	2012/05/02	\$(14.00)

Program Financial Summary Report by User by Date

ProgramFinancialDetailReport - Windows Internet Explorer



Program Financial Detail Report

User Detail

[Print](#)
[Return](#)

Printed: 2012/10/25

Reporting Period: 2012/01/02 - 2012/05/02

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Spec Capacity:	193
Funding Capacity:	5	Male/Female:	Female
Minimum Age:	0	Maximum Age:	100

Disb. Type	Amount
Client Safekeeping	-\$234.00
Food Allowance	\$93.00
Personal Needs Allowance	\$210.80
Total	\$69.80

	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$244.00	\$14.00	\$0.00	\$0.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$279.10	\$10.00	\$38.70	\$0.00
Out (Withheld)		\$0.00		\$0.00
Total	-\$35.10	\$4.00	-\$38.70	-\$0.00
Grand Total		-\$31.10		-\$38.70

[Excel](#) [PDF](#)

Date	Disb. Type	C&F Type	Amount	User Name	Trans. Type	Paid By	ID	Client Id	Client Name
2012/03/22	Food Allowance		\$9.00		Allowance Override	CASH			
2012/04/10	Client Safekeeping	Deposit [Cash]	\$(150.00)		Regular	CASH			
2012/04/10	Client Safekeeping	Deposit [Cash]	\$(50.00)		Regular	CASH			
2012/04/10	Personal Needs Allowance		\$38.70		Regular	CHEQUE []			
2012/04/18	Client Safekeeping	Deposit [Cash]	\$(9.00)		Regular	CASH			
2012/04/18	Client Safekeeping	Withdraw	\$14.00		Regular	CASH			
2012/04/18	Client Safekeeping	Deposit [Cash]	\$(25.00)		Regular	CASH			
2012/04/18	Food Allowance		\$28.00		Regular	CASH			
2012/04/18	Food Allowance		\$28.00		Regular	CASH			
2012/04/18	Food Allowance		\$28.00		Regular	CASH			
2012/04/18	Personal Needs Allowance		\$73.10		Regular	CASH			
2012/04/18	Personal Needs Allowance		\$99.00		Allowance Override	CASH			
2012/05/02	Client Safekeeping	Withdraw	\$(14.00)		Reverse	CASH			
2012/05/02	Client Safekeeping	Deposit [Cash]	\$10.00		Reverse	CASH			
2012/05/02	Client Safekeeping	Deposit [Cash]	\$(10.00)		Regular	CASH			
2012/05/02	Personal Needs Allowance		\$0.00		Not To Be Paid				

Program Financial Summary Report by User viewing full transaction *Details*

37. Shelter Client Report

Report Category: Shelter

Access Via: Shelter Navigator

User Access Group: All Shelter Users

Description:

This Shelter based report show currently active or clients admitted within the last 60 days basic, important occupancy and case note count information in a detailed tabular format. The beginning of the report also displays Shelter profile and report parameter information.

You can also filter this report for Clients who are assigned to any particular shelter staff upon admission.

Report Parameters:

Type of Report	(i.e. <i>Active Clients, Clients within the past 60 days</i>)
Primary Worker	(staff selected in the Client Admission screen)

Report Detail (Fields):

Program	(program name)
Client No.	(SMIS client ID)
Last Name	(client's lastname)
First Name	(client's firstname)
Admission Date	(most recent client's admission date into this shelter program)
Room	(room ID)
Bed	(bed ID)
PNA Eligibility	(last PNA eligibility TO date)
Most Recent Case Note	(creation date of most recent case note)
Incomplete Case Notes	(count)
Primary Worker/Last Updated By	(name of primary worker assigned to client in admission screen or staff who last updated the Client Admission record)

Report Header:

Active Clients (Bed)

Reporting Period: 2012/04/10	<i>Will only be available for the day you are printing the report</i>
-------------------------------------	---

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the shelter</i>

Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	0	Maximum Age	100

Type of Report	Active Clients	Primary Worker	Any	<i>You can run this report for specific staff members, or clients who have been discharged or remain active. Lists clients who are active at the time the report is run</i>
-----------------------	----------------	-----------------------	-----	---


Program	Any	You can filter this report by selecting a Program within this Shelter
----------------	-----	---

Export Options: [Excel](#) , [PDF](#)

*You can download this report to an excel document and then sort according to any of the columns
You can download to a PDF for a printable version*

Report Sample Screen:

Client Report - Windows Internet Explorer



Active Clients

Print Close

Printed: 2013/03/25

Reporting Period: 2013/03/25

HC: Shelter:	Covenant House	Organization:	Covenant House Toronto
Description:	Youth Shelter	Contact:	
Type:	Youth Shelter	Phone:	
Status:	Active		

Type of Report: Active Clients

Primary Worker: Any

Search

Program: Any

Excel PDF

Program	Client No.	Last Name	First Name	Most Recent Intake Date	Never Expired	Intake Status	Admission Date	Room	Bed	PNA Eligibility	End/ Discharge Date	Most Recent Case Note	Incomplete Case Note	Primary Worker/ Last Updated By
Covenant House Residence							2010/01/14	328-S	328 A			2011/10/27	2	
Covenant House Residence							2010/01/14	212	212 A	2012/06/30 [v]		2013/01/10	1	
Covenant House Residence							2010/01/14	319-S	319 A				0	
Covenant House Residence							2010/01/14	207	207 B				0	
Covenant House Residence							2010/01/27	309	309 B				0	
Covenant House Residence							2010/01/14	334	334 B				0	
Covenant House Residence							2010/01/19	211	211 A				0	
Covenant House Residence							2010/01/14	332-S	332 A				0	
Covenant House Residence							2010/01/18	205	205 A				0	

38. Shelter Client Intake Report

Report Category: Shelter

Access Via: Shelter Navigator

User Access Group: All Shelter Users

Description:

This Shelter based report shows all new intakes with their most relevant information, created during a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Shelter profile and report parameter information.

Report Parameters:

Intake Date From	(report start date, default is 60 days from current date)
Intake Date To	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

Report Detail (Fields):

Program	(program name)
Name	(client lastname, firstname)
DOB	(client's date of birth)
Client No.	(SMIS client number)
Intake Status	(current intake status: <i>admitted, discharged, active, inactive</i>)
Lived last 12 Mnths	(where client lived in the last 12 months: <i>Toronto, Elsewhere in Ontario, Indian Reserve, Another Province, Outside Canada, Unorganized Territories, Other</i>)
Reason for Service	(reason the client request shelter service)
Intake Date	(date of intake)
Service End Date	(end date of service – for Service programs Only)
Rejection Date	(date intake was rejected)
Rejection Reason	(reason intake was rejected)
Relationship	(client's relationship to head of household: <i>Dependant, Spouse/Partner</i>)

Export Options: [Excel](#), [PDF](#)

Report Header:

Shelter Client Intake Report

<i>This report provides the number of new intake in a specified period</i>
Reporting Period: 2012/02/06 – 2012/04/10 <i>lists dates entered below</i>

This is the facility information populated automatically			
Name	Shelter name – Bedded program	Facility	Shelter Name
Description	Client group described	Phone	Shelter phone number
Health Information	Yes / No	Type	Type of program –

Custodian			<i>bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the shelter</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>


Intake Date From	2012/02/06	Intake Date To	2012/04/10	Search
-------------------------	------------	-----------------------	------------	---------------

Program	Total Unique clients	Total Intakes
<i>Program name within the Shelter</i>	<i>Total number of unique clients listed within this period</i>	<i>Total number of new intakes in this period</i>
Total	<i>Totals for all Programs</i>	<i>Totals for all Programs</i>

Program:	Blank for All or select one Program from within the Shelter	Program Type:	Blank for All or select Bed or Service Program Type
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Report Sample Screen:

Shelter - Client Intake Report - Windows Internet Explorer



Shelter - Client Intake Report

Print Close

Printed: 2013/03/25

Reporting Period: 2012/12/26 - 2013/03/25

Shelter:	Covenant House	Organization:	Covenant House Toronto
Description:	Youth Shelter	Contact:	
Type:	Youth Shelter	Phone:	
Status:	Active		

Start Date: 2012/12/26 End Date: 2013/03/25 Search

Excel PDF

Program	Total Unique Clients	Total Intakes
Covenant House Health Care Services	1	1
Covenant House Residence	1	1
Total	2	2

Program: Program Type:

Program	Name	DOB	Client No.	Intake Status	Lived Last 12 Mths	Reason for Service	Intake Date	Service End Date	Rejection Date	Rejection Reason	Relationship
Covenant House Residence				admitted	Toronto	Relationship Breakdown	2013/03/19				
Covenant House Health Care Services				active	Toronto	Discharged from Institution	2013/01/11				

2 items found, displaying all items.

39. Shelter Client Occupancy Report

Report Category: Shelter

Access Via: Program Navigator

User Access Group: All Shelter Users

Description:

This Shelter based report shows all client admissions that has at least 1 stay day during a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Shelter profile and report parameter information.

Report Parameters:

Start Date	(report start date, default is 60 days from current date)
End Date	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

Report Detail (Fields):

Program	(program name)
Name	(client lastname, firstname)
DOB	(client's date of birth)
Client No.	(SMIS client number)
Room	(room number of the admission)
Bed	(bed number of the admission – applicable for non-family programs Only)
Occup. Status	(current occupancy status: <i>admitted, discharged</i>)
Admission Date	(date the client was admitted)
Discharge Date	(date the client was discharged)
Discharge Reason	(reason the client was discharged)
Relationship	(client's relationship to head of household: <i>Dependant, Spouse/Partner</i>)
Bed Nights	(total bed nights stayed during the reporting date range)

Export Options: [Excel](#), [PDF](#)

Report Header:

Shelter Client Occupancy Report

<i>This report provides the total number of clients admitted in specified period (not unique)</i>
Reporting Period: 2012/02/06 – 2012/04/10 <i>lists dates entered below</i>

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the</i>

			<i>shelter</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>


Intake Date From	2012/02/06	Intake Date To	2012/04/10	Search <i>Can go Back 90 Days</i>
-------------------------	------------	-----------------------	------------	-----------------------------------

Program	Total Unique clients	Total Bed Nights
<i>Program name within the Shelter</i>	<i>Total number of unique clients listed within this period</i>	<i>Total occupancy for reporting period – not related to specific clients</i>
Total	<i>Totals for all Programs</i>	<i>Totals for all Programs</i>

Program:	Blank for All or select one Program from within the Shelter
-----------------	---

Report Sample Screen:

Shelter Client Occupancy Report - Windows Internet Explorer



Shelter Client Occupancy Report

Print Close

Printed: 2013/03/25

Reporting Period: 2013/02/09 - 2013/03/25

HC: Shelter:	Covenant House	Organization:	Covenant House Toronto
Description:	Youth Shelter	Contact:	
Type:	Youth Shelter	Phone:	
Status:	Active		

Start Date: 2013/02/09 End Date: 2013/03/25 Search

Excel PDF

Program	Total Unique Clients	Total Bed Nights
Covenant House Residence	77	3350
Covenant House-Rights of Passage	27	1188
Total	104	4538

Program:

Program	Name	DOB	Client No.	Room	Bed	Occup. Status	Admission Date	Discharge Date	Discharge Reason	Relationship	Bed Nights
Covenant House Residence				317-S	317 A	admitted	2010/01/14				44
Covenant House Residence				302	302 B	admitted	2010/01/22				44
Covenant House Residence				328-S	328 A	admitted	2010/01/14				44
Covenant House Residence				203	203 A	admitted	2010/01/14				44
Covenant House Residence				301	301 B	admitted	2010/01/14				44
Covenant House Residence				309	309 B	admitted	2010/01/27				44
Covenant House Residence				204	204 A	admitted	2010/01/26				44
Covenant House-Rights of Passage				303	303	admitted	2010/01/14				44
Covenant House-Rights of Passage				327	327	admitted	2010/01/14				44

40. Shelter Client Discharge Report

Report Category: Shelter

Access Via: Program Navigator

User Access Group: All Shelter Users

Description:

This Shelter based report shows all client discharges during a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Shelter profile and report parameter information.

Report Parameters:

Start Date	(report start date, default is 60 days from current date)
End Date	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

Report Detail (Fields):

Program	(program name)
Name	(client lastname, firstname)
DOB	(client's date of birth)
Client No.	(SMIS client number)
Admission Date	(date the client was admitted)
Discharge Date	(date the client was discharged)
Discharge Reason	(reason the client was discharged)
Discharge Disposition	(where the client was discharge to)
Relationship	(client's relationship to head of household: <i>Dependant, Spouse/Partner</i>)

Export Options: [Excel](#), [PDF](#)

Report Header:

Shelter - Client Discharge Report

<i>This report provides the number of discharges in a specified period</i>
Reporting Period: 2012/02/06 – 2012/04/10 <i>lists dates entered below</i>

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the shelter</i>
Funding Capacity:	<i>Max. # of funded beds</i>	Male/Female	<i>Client group</i>

	<i>based upon Shelter Operating Agreement</i>		
Minimum Age	0	Maximum Age	100

Intake Date From	2012/02/06	Intake Date To	2012/04/10	Search
-------------------------	------------	-----------------------	------------	---------------


Total clients	<i>Total number of clients listed within this period</i>	Total Discharges	<i>Total number of discharges in this period, not related to unique clients</i>
----------------------	--	-------------------------	--

Program	Total Unique clients	Total Discharges
<i>Program name within the Shelter</i>	<i>Total number of clients listed within this period</i>	<i>Total number of discharges in this period, not related to unique clients</i>
Total	<i>Totals for all Programs</i>	<i>Totals for all Programs</i>

Program:	Blank for All or select one Program from within the Shelter
-----------------	---

Report Sample Screen:

Shelter - Client Discharge Report - Windows Internet Explorer



Shelter - Client Discharge Report

Print Close

Printed: 2013/03/25

Reporting Period: 2012/12/26 - 2013/03/25

Shelter:	Christie Ossington Men's Hostel	Organization:	Christie Ossington Neighbourhood Centre
Description:	Emergency Shelter	Contact:	
Type:	Single Men's	Phone:	
Status:	Active		

Start Date: 2012/12/26 End Date: 2013/03/25 Search

Excel PDF

Program	Total Unique Clients	Total Discharges
Christie Ossington Men's Hostel	2	3
Total	2	3

Program:

Program	Name	DOB	Client No.	Admission Date	Discharge Date	Discharge Reason	Discharge Disposition	Relationship
Christie Ossington Men's Hostel				2013/03/01	2013/03/01	New Address - Transitional Housing	Custody	
Christie Ossington Men's Hostel				2013/01/11	2013/01/11	Repeated rule violations	Unknown	
Christie Ossington Men's Hostel				2013/01/11	2013/01/11	Detox	Custody	

3 items found, displaying all items.

41. Shelter Occupancy Report

Report Category: Shelter

Access Via: Program Navigator

User Access Group: All Shelter Users

Description:

This Shelter based report shows daily aggregate statistics occupancies for a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Shelter profile and report parameter information.

Note that all statistics are based upon the 4 a.m. official reporting time for the business day before. (For example, Feb 4 business day stats are based upon the counts as of 4 a.m. on Feb 5, after the 2 formal bed checks have been completed and SMIS is updated accordingly)

Report Parameters:

Start Date	(report start date, default is 60 days from current date)
End Date	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

Report Detail (Fields):

Summary Block

Queue	(current queue size)
Occupancy	(occupancy @ 4am today)
Average Occupancy	(average daily occupancy over the reporting period)
Vacancy	(vacancy @ 4am today)
Average Vacancy	(average daily vacancy over the reporting period)
Actual Capacity	(current actual capacity)
Average Capacity	(average daily actual capacity over the reporting period)
Funding Capacity	(current funding capacity over the reporting period)

Detailed Table

Program	(program name)
Date	(a date within the reporting date range)
Queue	(queue @ 4am next day)
Occupancy	(occupancy @ 4am next day)
Vacancy	(vacancy @ 4am next day)
Actual Capacity	(actual capacity of program @ 4am next day)
Funding Capacity	(funding capacity of program)

Export Options: [Excel](#), [PDF](#)

Report Header:

Shelter Occupancy Report


Reporting Period: 2012/02/1 – 2012/04/10	<i>From dates entered below</i>
---	---------------------------------

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the shelter</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Date From	2012/02/06	Date To	2012/04/10	Search <i>can go back 90 days</i>
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Report Sample Screen:

Shelter Occupancy Report - Windows Internet Explorer



Shelter Occupancy Report

Print Close

Printed: 2013/03/25

Reporting Period: 2013/02/23 - 2013/03/24

HC: Shelter:	Christie Ossington Men's Hostel	Organization:	Christie Ossington Neighbourhood Centre
Description:	Emergency Shelter	Contact:	
Type:	Single Men's	Phone:	
Status:	Active		

Date From: 2013/02/23 Date To: 2013/03/24 Search

Excel PDF

Program	Queue	Occupancy	Average Occupancy	Vacancy	Average Vacancy	Actual Capacity	Average Capacity	Funding Capacity
Christie Ossington Men's Hostel	4	7	7	46	46	53	53	53

Program	Date	Queue	Occupancy	Vacancy	Actual Capacity	Funding Capacity
Christie Ossington Men's Hostel	2013/02/24	4	7	46	53	53
Christie Ossington Men's Hostel	2013/02/25	4	7	46	53	53
Christie Ossington Men's Hostel	2013/02/26	4	7	46	53	53
Christie Ossington Men's Hostel	2013/02/27	5	7	46	53	53
Christie Ossington Men's Hostel	2013/02/28	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/01	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/02	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/03	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/04	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/05	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/06	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/07	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/08	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/09	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/10	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/11	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/12	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/13	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/14	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/15	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/16	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/17	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/18	4	7	46	53	53
Christie Ossington Men's Hostel	2013/03/19	4	7	46	53	53

42. Shelter Service Restriction Report

Report Category: Shelter

Access Via: Shelter Navigator

User Access Group: All Shelter Users who can view or update Service Restrictions

Description:

This Shelter based report shows all service restrictions active at any time within a specified date range based upon the restriction's start and potential end date. The default restriction start dates has a range of the last 60 calendar days (as a default setting but can be changed by the user). The default restriction end dates has a range of the last 60 calendar days also (as a default setting but can also be changed by the user). There is no maximum reporting date ranges size setting here. The beginning of the report also displays Shelter profile and report parameter information.

Report Parameters:

Start Date From	(the earliest date of the start date of the service restrictions to report, default is 60 days before the current date)
Start Date To	(the latest date of the start date of the service restrictions to report, default is today)
End Date From	(the earliest date of the end date of the service restrictions to report, default is 60 days prior to today)
End Date To	(the latest date of the potential end date of the service restrictions to report, default is today)
Status	(current status of the service restriction: <i>blank</i> meaning all, <i>in progress</i> , <i>completed</i> , <i>terminated early</i>)

There are NO Maximum Reporting Date Range restrictions for this report.

Report Detail (Fields):

Program	(program name)
Client ID	(SMIS client identifier)
Client Name	(lastname, firstname of client)
Restriction Reason	(reason for the service restriction)
Date	(the start date of the service restriction)
Duration (DAYS)	(the original duration of the service restriction)
Status	(current status of the service restriction: <i>in progress</i> , <i>completed</i> , <i>terminated early</i>)

Export Options: [Excel](#), [PDF](#)

Report Header:

Shelter - Service Restriction Report

This report indicates each service restriction recorded within the range identified.

Reporting Period: 2012/02/1 – 2012/04/10 *From dates entered below*

This is the facility information populated automatically


Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the shelter</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Start Date From	2012/02/11	End Date From	2012/04/10	Status
To	2012/04/10	To	2012/04/10	<i>Search can go back 90 days</i>
	Identifies range of service restriction start dates		Identifies range of service restriction end dates	

Program:	Blank for All or select one Program from within the Shelter	Program Type:	Blank for All or select Bed or Service Program Type
-----------------	---	----------------------	---

Report Sample Screen:

Shelter - Service Restriction Report - Windows Internet Explorer



Shelter - Service Restriction Report

Print Close

Printed: 2013/03/25

Restriction Start Date: 2012/01/24 - 2013/03/25, Restriction End Date: 2012/01/24 - 2013/03/25, Status:

Shelter:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Start Date From

2012/01/24

End Date From

2012/01/24

Status

To

2013/03/25

To

2013/03/25

Search

Program:

Program Type:

Excel PDF

Program	Client ID	Client Name	Restriction Reason	Date	Duration (DAYS)	Status	Early Termination By
Birkdale Residence - Bedded Program			Assault of residents, volunteers or staff	2012/04/04 04:01:30 PM	15	completed	,
Birkdale Residence - Bedded Program			Disruptive behaviour	2012/04/04 04:01:52 PM	6	completed	,
Birkdale Residence - Bedded Program			Assault of client	2012/05/01 11:01:40 AM	90	completed	,
Birkdale Residence - Bedded Program			Assault of client	2012/07/12 11:52:12 AM	90	completed	,
Birkdale Residence - Bedded Program			Behaviours that compromise the health & safety of residents, volunteers or staff	2012/07/12 11:52:23 AM	15	completed	,
Birkdale Residence - Bedded Program			Not participating in case planning	2012/08/30 02:58:23 PM	0	terminated early	,
Birkdale Residence - Bedded Program			Other - see Service Restriction notes	2012/10/01 09:29:50 AM	1	completed	,
Birkdale Residence - Bedded Program			Assault of residents, volunteers or staff	2013/03/19 09:15:43 AM	1	completed	,

8 items found, displaying all items.

43. Shelter PNA To Be Paid Report

Report Category: Shelter

Access Via: Shelter Navigator - Financial

User Access Group: All Shelter Users who has access to SMIS Financials

Description:

This Shelter based report shows the current PNA liability of the Shelter. It lists all the amount owing to clients who have been deemed PNA eligible by staff and have not collected the listed PNA amounts from the last 37 calendar days prior to today. Note that any PNA amounts owing older than 37 days are not included in this report since they are no longer eligible to be given out. The beginning of the report also displays Shelter profile information.

Report Parameters:

None

Report Detail (Fields):

Summary Block

Total Clients	(total number of clients owing PNA to)
Total Bed Nights	(total number of bed nights of PNA owing to all eligible clients that have not been collected within the last 37 days)
Total Balance	(the current total amount – liability – of PNA owing)

Detailed Table

Program	(program name)
Client No.	(SMIS client number)
Last Name	(lastname of client)
First Name	(firstname of client)
Last Admission Date	(the latest admission date of the client)
Bed Night	(total number of bed night of PNA owing to the client)
Balance	(total \$ amount of PNA owing to the client)
Discharged	(shows whether the client is discharged or not: <i>discharged, active</i>)

Export Options: [Excel](#), [PDF](#)

Report Header:

PNA To Be Paid Report


This report provides the list of all clients whose eligibility has been checked, and they have stayed at the shelter and therefore PNA is owed to them. The clients on this report may not currently be staying at the

shelter, but they have PNA owed to them from the period identified in the report

Reporting Period: 2012/04/10		<i>Registers the date the report is run</i>	
This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the shelter</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Report Sample Screen:

PNA To Be Paid Report - Windows Internet Explorer



PNA To Be Paid Report

Print Close

Printed: 2012/10/25

Reporting Period: 2012/10/25

HC: Shelter:	Seaton House	Organization:	City of Toronto
Description:	Seaton House is a multi-service agency serving Homeless Men	Contact:	
Type:	Men	Phone:	416-392-5522
Status:	Active		

Program	Total Clients	Total Bed Nights	Balance
Seaton House - Hostel Program	2	14	\$60.20
Total	2	14	\$60.20

[Excel](#)
[PDF](#)

Program	Client No.	Last Name	First Name	Last Admission Date	Bed Nights	Balance	Discharged
Seaton House - Hostel Program				2012/08/29	7	\$30.10	Active
Seaton House - Hostel Program				2012/08/27	7	\$30.10	Active

2 items found, displaying all items.

44. Shelter Client Safekeeping Balances Report

Report Category: Shelter

Access Via: Shelter Navigator - Financial

User Access Group: All Shelter Users who has access to SMIS Financials

Description:

This Shelter based report shows the current Client Safekeeping Funds (CSF) liability of the Program as of a specified date (defaulted to today but can be changed by the user). It lists all the amount owing to clients who have balances of \$ safekeeping funds with the Shelter as of the specified date. The beginning of the report also displays Shelter profile information.

Report Parameters:

End Date	(the reporting date at which the CSF liability is calculated)
----------	---

Report Detail (Fields):

Summary Block

Total Clients	(total number of clients owing CSF to)
Balance	(the current total amount – liability – of CSF owing)

Detailed Table

Program	(program name)
Client No.	(SMIS client number)
Last Name	(lastname of client)
First Name	(firstname of client)
First Trans Date	(date of the first transaction done for the client depending upon the specified End Date parameter)
Last Trans Date	(date of the latest transaction done for the client depending upon the specified End Date parameter)
Balance	(total \$ amount of CSF owing to the client)
Currently Active	(shows whether the client is currently active in the program of not: Yes, No)

Export Options: [Excel](#), [PDF](#)

Report Header:

Client Safekeeping Balance Report

Reporting Period: 2012/04/10	<i>Registers the date the report is run</i>
-------------------------------------	---

End Date	2012/04/10 search	<i>Enter the date you are running the report, and this will include all client safekeeping balances held as of that date</i>
----------	-------------------	--

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the shelter</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Report Sample Screen:

Client Safekeeping Balance Report - Windows Internet Explorer

Client Safekeeping Balance Report Print Close

Printed: 2012/10/26

Reporting Period: 2012/10/26

End Date: 2012/10/26 Search

HC: Shelter:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	(416) 392-5650
Status:	Active		

Program	Total Clients	Balance
Birkdale Residence - Bedded Program	18	\$108,755.75
Total	18	\$108,755.75

[Excel](#) [PDF](#)

Program	Client No.	Last Name	First Name	First Trans Date	Last Trans Date	Balance	Currently Active
Birkdale Residence - Bedded Program				2012/04/10	2012/04/10	\$150.00	Yes
Birkdale Residence - Bedded Program				2011/05/17	2011/10/18	\$85.00	No
Birkdale Residence - Bedded Program				2011/01/14	2011/09/06	\$100,070.89	No
Birkdale Residence - Bedded Program				2011/02/18	2011/09/06	\$87.00	No
Birkdale Residence - Bedded Program				2011/06/17	2011/07/18	\$0.00	No
Birkdale Residence - Bedded Program				2011/06/02	2011/07/18	\$35.00	No
Birkdale Residence - Bedded Program				2011/02/18	2011/07/07	\$78.00	No
Birkdale Residence - Bedded Program				2011/07/05	2011/07/14	\$106.20	No
Birkdale Residence - Bedded Program				2011/07/05	2011/07/14	\$135.36	No
Birkdale Residence - Bedded Program				2012/04/10	2012/04/10	\$50.00	Yes
Birkdale Residence - Bedded Program				2011/01/18	2011/01/18	\$775.00	No
Birkdale Residence - Bedded Program				2011/01/19	2011/07/28	\$7,183.30	No
Birkdale Residence - Bedded Program				2011/07/18	2012/05/09	\$0.00	Yes
Birkdale Residence - Bedded Program				2011/07/18	2012/05/09	\$0.00	Yes
Birkdale Residence - Bedded Program				2011/07/18	2011/07/18	\$0.00	No
Birkdale Residence - Bedded Program				2011/07/18	2011/07/18	\$0.00	No
Birkdale Residence - Bedded Program				2011/07/18	2011/07/18	\$0.00	No
Birkdale Residence - Bedded Program				2012/05/02	2012/05/02	\$0.00	Yes

18 items found, displaying all items.

45. Shelter Exception Report

Report Category: Shelter

Access Via: Shelter Navigator - Financial

User Access Group: Supervisor & Manager Roles

Description:

This Shelter based report shows all the financial related exceptions for the Shelter as of a specified date range. The default range is of the last 60 days and can be globally changed. There is no maximum size to the date range. It lists all the transaction reversals, allowance override thru Give Allowance advance function, and Client Safekeeping Funds balances greater than a designated threshold amount (currently set to \$2000) as of the reporting End Date. The beginning of the report also displays Shelter profile information.

Report Parameters:

Start Date	(the reporting start date)
End Date	(the reporting to date)

Report Detail (Fields):

Program	(program name)
Date	(date and time of the financial transaction)
ID	(transaction ID)
Type	(transaction type: <i>Reverse, Allowance Override, CSF</i>)
Detail	(detail of the transaction incl. give allowance reasons for PNA or FA, corresponding reversed transaction ID)
Amount	(the amount of the transaction)
User Name	(the user who created the transaction)
Client ID	(SMIS client ID)
Client Name	(lastname and firstname of client)
Note	(note created during and regarding the transaction)

Export Options: [Excel](#), [PDF](#)

Report Header:

Exception Report

Reporting Period: according to dates entered below

Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the shelter</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Start Date		End Date		Search
------------	--	----------	--	--------

Date	ID	Type	Detail	Amount	User Name	Client ID	Client Name	Note

Print Options: Report Print action button

Report Sample Screen:

Exception Report - Windows Internet Explorer

toronto **SMIS**

Exception Report

Print Close

Printed: 2012/10/26

Reporting Period: 2012/01/01 - 2012/06/29

HC: Shelter:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Start Date
2012/01/01
End Date
2012/06/29
Search

Excel PDF

Program	Date	ID	Type	Detail	Amount	User Name	Client ID	Client Name	Note
Birkdale Residence - Bedded Program	2012/05/09 09:41:34 AM		Reverse	Original TxID : Created 2012/05/09 09:40:27 AM	-\$198.70				
Birkdale Residence - Bedded Program	2012/06/08 04:02:28 PM		Reverse	Reason : PNA Reason 2	-\$100.00				sdfsdfas
Birkdale Residence - Bedded Program	2012/06/22 03:42:46 PM		Reverse	Reason : PNA Reason 1	-\$99.99				test
Birkdale Residence - Bedded Program	2012/05/02 10:43:43 AM		Reverse	Original TxID : Created 2012/04/18 12:47:47 PM	-\$14.00				test
Birkdale Residence - Bedded Program	2012/04/18 01:12:07 PM		Allowance Override	Reason : PNA Reason 1	\$99.00				test
Birkdale Residence - Bedded Program	2012/06/22 03:42:24 PM		Allowance Override	Reason : PNA Reason 1	\$99.99				testing!
Birkdale Residence - Bedded Program	2012/05/09 09:37:54 AM		Reverse	Original TxID : Created 2012/04/18 12:43:36 PM	-\$123.10				ttttttt
Birkdale Residence - Bedded Program	2012/03/22 10:21:02 AM		Allowance Override	Reason : FA Reason 1	\$9.00				d'g'df'dg'dg
Birkdale Residence - Bedded Program	2012/05/02 02:55:26 PM		Reverse	Original TxID : Created 2012/05/02 02:55:09 PM	\$10.00				d'asfasfas
Birkdale Residence - Bedded Program	2012/06/08 04:02:00 PM		Allowance Override	Reason : PNA Reason 2	\$100.00				test
Birkdale Residence - Bedded Program			CSF	Greater than Threshold	\$100,070.89				
Birkdale Residence - Bedded Program			CSF	Greater than Threshold	\$7,183.30				

12 items found, displaying all items.

46. Shelter Eligibility Report

Report Category: Shelter

Access Via: Shelter Navigator - Financial

User Access Group: All Shelter Users who has access to SMIS Financials

Description:

This Shelter based report shows the list of clients who has stayed at least 1 day in the last 14 days, and is missing an eligibility assessment record that covers that day(s). This means SMIS does not know if the client will be eligible for PNA or not for the missing eligibility. The reason 14 days is used is because a user can only create an eligibility assessment record going back 14 days. The beginning of the report also displays Shelter profile information.

Report Parameters:

None

Report Detail (Fields):

Program	(program name)
Client Id	(SMIS client number)
Client Name	(lastname and firstname of client)
Admission Status	(the current admission status of the client)
Admission Date	(the latest admission date of the client)
Discharge Date	(the latest discharge date of the client)
Primary Worker Name	(the name of the primary worker assigned to the client via the Admissions screen)

Export Options: [Excel](#), [PDF](#)

Report Header:

Shelter Eligibility Report

This report indicates each service restriction recorded within the range identified.

Reporting Period: 2012/04/10	<i>Enters the date the report is run</i>
-------------------------------------	--


This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Shelter Name</i>
Description	<i>Client group described</i>	Phone	<i>Shelter phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the</i>

			<i>shelter</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Client I.D.	Client Name	Admission Status	Admission Date	Discharge Date	Primary Worker Name
<i>Unique client number</i>		<i>Identifies if the client is currently residing in the shelter or has been discharged</i>	<i>Most recent admission date</i>	<i>Most recent discharge date</i>	<i>Case Worker assigned to each client</i>

Report Sample Screen:

Eligibility Report - Windows Internet Explorer



Shelter Eligibility Report

Print Close

Printed: 2012/10/26

Reporting Period: 2012/10/26

HC: Shelter:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Excel PDF

Program	Client id	Client Name	Admission Status	Admission Date	Discharge Date	Primary Worker Name
Birkdale Residence - Bedded Program			Active	2012/04/03		
Birkdale Residence - Bedded Program			Active	2012/03/13		
Birkdale Residence - Bedded Program			Active	2012/08/17		
Birkdale Residence - Bedded Program			Active	2011/07/18		
Birkdale Residence - Bedded Program			Active	2011/07/18		
Birkdale Residence - Bedded Program			Active	2012/01/10		
Birkdale Residence - Bedded Program			Active	2012/10/03		
Birkdale Residence - Bedded Program			Active	2011/11/01		
Birkdale Residence - Bedded Program			Active	2011/11/01		
Birkdale Residence - Bedded Program			Active	2012/09/21		
Birkdale Residence - Bedded Program			Active	2012/04/03		
Birkdale Residence - Bedded Program			Active	2012/10/03		

12 items found, displaying all items.

47. Facility Client Report

Report Category: Facility

Access Via: Facility Navigator

User Access Group: All Facility Users

Description:

This Facility based report show currently active or clients admitted within the last 60 days basic, important occupancy and case note count information in a detailed tabular format. The beginning of the report also displays Facility profile and report parameter information.

You can also filter this report for Clients who are assigned to any particular facility program staff upon admission.

Report Parameters:

Type of Report	(i.e. <i>Active Clients, Clients within the past 60 days</i>)
Primary Worker	(staff selected in the Client Admission screen)

Report Detail (Fields):

Program	(program name)
Client No.	(SMIS client ID)
Last Name	(client's lastname)
First Name	(client's firstname)
Admission Date	(most recent client's admission date into this shelter program)
Room	(room ID)
Bed	(bed ID)
PNA Eligibility	(last PNA eligibility TO date)
Most Recent Case Note	(creation date of most recent case note)
Incomplete Case Notes	(count)
Primary Worker	(name of primary worker assigned to client in admission screen)

Export Options: [Excel](#), [PDF](#)

*You can download this report to an excel document and then sort according to any of the columns
You can download to a PDF for a printable version*

Report Header:

Facility Active Clients (Bed)


Reporting Period: 2012/04/10	<i>Will only be available for the day you are printing the report</i>
-------------------------------------	---

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Facility phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the shelter</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Type of Report	Active Clients	Primary Worker	Any	<i>You can run this report for specific staff members, or clients who have been discharged or remain active. Lists clients who are active at the time the report is run</i>
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Report Sample Screen:

Client Report - Windows Internet Explorer



Active Clients (Bed)



Print Close

Printed: 2013/03/25

Reporting Period: 2013/03/25

Name:	Christie Ossington Men's Hostel	Facility:	Christie Ossington Men's Hostel
Description:	Single Men's	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	53
Funding Capacity:	53	Male/Female:	Male
Minimum Age:	18	Maximum Age:	65

Type of Report: Primary Worker:

  Excel PDF

Client No.	Last Name	First Name	Admission Date	Room	Bed	PNA Eligibility	Most Recent Case Note	Incomplete Case Notes	Primary Worker
				Dorm	03t	2013/03/31 [v]	2010/04/27	1	
				Dorm	09t	2013/03/31 [v]			
				Dorm	10b	2013/03/31 [v]	2011/05/19	0	
				Dorm	05t	2013/03/31 [v]			
				Dorm	02b	2013/03/31 [v]			
				test1	Room test1 - bed1	2013/03/31 [v]			
				Dorm	35	2013/03/31 [v]	2013/01/11	1	

7 items found, displaying all items.

48. Facility Client Intake Report

Report Category: Facility

Access Via: Facility Navigator

User Access Group: All Facility Users

Description:

This Facility based report shows all new intakes with their most relevant information, created during a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Facility profile and report parameter information. The Reporting Period can be set by the end user.

Report Parameters:

Intake Date From	(report start date, default is 60 days from current date)
Intake Date To	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

Report Detail (Fields):

Program	(program name)
Name	(client lastname, firstname)
DOB	(client's date of birth)
Client No.	(SMIS client number)
Intake Status	(current intake status: <i>admitted, discharged, active, inactive</i>)
Lived last 12 Mnths	(where client lived in the last 12 months: <i>Toronto, Elsewhere in Ontario, Indian Reserve, Another Province, Outside Canada, Unorganized Territories, Other</i>)
Reason for Service	(reason the client request shelter service)
Intake Date	(date of intake)
Service End Date	(end date of service – for Service programs Only)
Rejection Date	(date intake was rejected)
Rejection Reason	(reason intake was rejected)
Relationship	(client's relationship to head of household: <i>Dependant, Spouse/Partner</i>)

Export Options: [Excel](#), [PDF](#)

Report Header:

Client Intake Report

<i>This report provides the number of new intake in a specified period</i>
Reporting Period: 2012/02/06 – 2012/04/10 <i>lists dates entered below</i>

This is the facility information populated automatically			
Name	Shelter name – Bedded program	Facility	Shelter Name
Description	Client group described	Phone	Shelter phone number


Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the facility</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Intake Date From	2012/02/06	Intake Date To	2012/04/10	Search
-------------------------	------------	-----------------------	------------	---------------

Total clients	<i>Total number of clients intake within this period</i>	Total Intakes	<i>Total number of new intakes in this period</i>
----------------------	--	----------------------	--

Report Sample Screen:

Client Report - Windows Internet Explorer



Client Intake Report

Print Close

Printed: 2013/03/25

Reporting Period: 2012/12/26 - 2013/03/25

Name:	Christie Ossington Men's Hostel	Facility:	Christie Ossington Men's Hostel
Description:	Single Men's	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	53
Funding Capacity:	53	Male/Female:	Male
Minimum Age:	18	Maximum Age:	65

Intake Date From 2012/12/26 Intake Date To 2013/03/25 Search

Excel PDF

Total Clients	4	Total Intakes	6
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Name	DOB	Client No.	Intake Status	Lived Last 12 Mnths	Reason for Service	Intake Date	Service End Date	Rejection Date	Rejection Reason	Relationship
			rejected	Another Province	Relocating	2013/01/10		2013/01/11	Automatic Rejection	
			discharged	Other	Transient	2013/01/11				
			admitted	Toronto	Discharged from Institution	2013/01/11				
			discharged	Toronto	Discharged from Institution	2013/01/11				
			rejected	Toronto	Discharged from another Shelter	2013/02/27		2013/02/28	Automatic Rejection	
			discharged	Elsewhere in Ontario	Evicted by Landlord	2013/03/01				

6 items found, displaying all items.

49. Facility Client Occupancy Report

Report Category: Facility

Access Via: Facility Navigator

User Access Group: All Facility Users

Description:

This Facility based report shows all client admissions that has at least 1 stay day during a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Facility profile and report parameter information. The Reporting Period can be set by the end user.

Report Parameters:

Start Date	(report start date, default is 60 days from current date)
End Date	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

Report Detail (Fields):

Program	(program name)
Name	(client lastname, firstname)
DOB	(client's date of birth)
Client No.	(SMIS client number)
Room	(room number of the admission)
Bed	(bed number of the admission – applicable for non-family programs Only)
Occup. Status	(current occupancy status: <i>admitted, discharged</i>)
Admission Date	(date the client was admitted)
Discharge Date	(date the client was discharged)
Discharge Reason	(reason the client was discharged)
Relationship	(client's relationship to head of household: <i>Dependant, Spouse/Partner</i>)
Bed Nights	(total bed nights stayed during the reporting date range)

Export Options: [Excel](#), [PDF](#)

Report Header:

Facility Navigator - Client Occupancy Report

<i>This report provides the total number of clients admitted in specified period (not unique)</i>
Reporting Period: 2012/02/06 – 2012/04/10 <i>lists dates entered below</i>

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Facility phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>


Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the facility</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Intake Date From	2012/02/06	Intake Date To	2012/04/10	Search Can go Back 90 Days
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Total clients	<i>Total number of clients stayed within this period</i>	Total Bed Nights	<i>Total occupancy for reporting period – not related to specific clients</i>
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Report Sample Screen:

Client Occupancy Report - Windows Internet Explorer



Client Occupancy Report

Print Close

Printed: 2013/03/25

Reporting Period: 2013/02/03 - 2013/03/19

Name:	Christie Ossington Men's Hostel	Facility:	Christie Ossington Men's Hostel
Description:	Single Men's	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	53
Funding Capacity:	53	Male/Female:	Male
Minimum Age:	18	Maximum Age:	65

Start Date: 2013/02/03 End Date: 2013/03/19 Search

Excel PDF

Total Clients	7	Total Bed Nights	315
---------------	---	------------------	-----

Name	DOB	Client No.	Room	Bed	Occup. Status	Admission Date	Discharge Date	Discharge Reason	Relationship	Bed Nights
			Dorm	03t	admitted	2010/04/27				45
			Dorm	35	admitted	2013/01/11				45
			Dorm	09t	admitted	2010/08/03				45
			Dorm	02b	admitted	2010/06/22				45
			Dorm	10b	admitted	2010/02/26				45
			Dorm	05t	admitted	2010/05/11				45
			test1	Room test1 - bed1	admitted	2012/10/25				45

7 items found, displaying all items.

50. Facility Client Discharge Report

Report Category: Facility

Access Via: Facility Navigator

User Access Group: All Facility Users

Description:

This Facility based report shows all client discharges during a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Facility profile and report parameter information. The Reporting Period can be set by the end user.

Report Parameters:

Start Date	(report start date, default is 60 days from current date)
End Date	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

Report Detail (Fields):

Program	(program name)
Name	(client lastname, firstname)
DOB	(client's date of birth)
Client No.	(SMIS client number)
Admission Date	(date the client was admitted)
Discharge Date	(date the client was discharged)
Discharge Reason	(reason the client was discharged)
Discharge Disposition	(where the client was discharge to)
Relationship	(client's relationship to head of household: <i>Dependant, Spouse/Partner</i>)

Export Options: [Excel](#), [PDF](#)

Report Header:

Client Discharge Report

<i>This report provides the number of discharges in a specified period</i>
Reporting Period: 2012/02/06 – 2012/04/10 <i>lists dates entered below</i>

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Facility phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the facility</i>


Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	0	Maximum Age	100

Intake Date From	2012/02/06	Intake Date To	2012/04/10	Search
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Total clients	<i>Total number of clients discharged within this period</i>	Total Discharges	<i>Total number of discharges in this period, not related to unique clients</i>
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Report Sample Screen:

Client Discharge Report - Windows Internet Explorer



Client Discharge Report

Print Close

Printed: 2013/03/25

Reporting Period: 2012/12/20 - 2013/03/19

Name:	Christie Ossington Men's Hostel	Facility:	Christie Ossington Men's Hostel
Description:	Single Men's	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	53
Funding Capacity:	53	Male/Female:	Male
Minimum Age:	18	Maximum Age:	65

Start Date: 2012/12/20 End Date: 2013/03/19 Search

Excel PDF

Total Clients	2	Total Discharges	3
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Name	DOB	Client No.	Admission Date	Discharge Date	Discharge Reason	Discharge Disposition	Relationship
			2013/03/01	2013/03/01	New Address - Transitional Housing	Custody	
			2013/01/11	2013/01/11	Repeated rule violations	Unknown	
			2013/01/11	2013/01/11	Detox	Custody	

3 items found, displaying all items.

51. Facility Occupancy Report

Report Category: Facility

Access Via: Facility Navigator

User Access Group: All Facility Users

Description:

This Facility based report shows daily aggregate statistics occupancies for a specified date range. The default range is of the last 60 days and can be globally changed. The maximum allowed date range is defaulted to 90 days and can also be globally adjusted. The beginning of the report also displays Facility profile and report parameter information.

Note that all statistics are based upon the 4 a.m. official reporting time for the business day before. (For example, Feb 4 business day stats are based upon the counts as of 4 a.m. on Feb 5, after the 2 formal bed checks have been completed and SMIS is updated accordingly)

Report Parameters:

Start Date	(report start date, default is 60 days from current date)
End Date	(report to date, default is today)

Maximum Report Date Range is defaulted to 90 days

Report Detail (Fields):

Summary Block

Queue	(current queue size)
Occupancy	(occupancy @ 4 a.m. today)
Average Occupancy	(average daily occupancy over the reporting period)
Vacancy	(vacancy @ 4 a.m. today)
Average Vacancy	(average daily vacancy over the reporting period)
Actual Capacity	(current actual capacity)
Average Capacity	(average daily actual capacity over the reporting period)
Funding Capacity	(current funding capacity over the reporting period)

Detailed Table

Program	(program name)
Date	(a date within the reporting date range)
Queue	(queue @ 4 a.m. next day)
Occupancy	(occupancy @ 4 a.m. next day)
Vacancy	(vacancy @ 4 a.m. next day)
Actual Capacity	(actual capacity of program @ 4 a.m. next day)
Funding Capacity	(funding capacity of program)

Export Options: [Excel](#), [PDF](#)

Report Header:

Facility Occupancy Report


Reporting Period: 2012/02/1 – 2012/04/10	<i>From dates entered below</i>
---	---------------------------------

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Facility phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the facility</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Date From	2012/02/06	Date To	2012/04/10	Search <i>can go back 90 days</i>
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Report Sample Screen:

Client Report - Windows Internet Explorer





Program Occupancy Report



Print Close

Printed: 2013/03/25

Reporting Period: 2013/02/17 - 2013/03/18

Name:	Christie Ossington Men's Hostel	Facility:	Christie Ossington Men's Hostel
Description:	Single Men's	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	53
Funding Capacity:	53	Male/Female:	Male
Minimum Age:	18	Maximum Age:	65

Date From 
 Date To 

Queue	Occupancy	Average Occupancy	Vacancy	Average Vacancy	Actual Capacity	Average Capacity	Funding Capacity
4	7	7	46	46	53	53	53

Date	Queue	Occupancy	Vacancy	Actual Capacity	Funding Capacity
2013/02/17	4	7	46	53	53
2013/02/18	4	7	46	53	53
2013/02/19	4	7	46	53	53
2013/02/20	4	7	46	53	53
2013/02/21	4	7	46	53	53
2013/02/22	4	7	46	53	53
2013/02/23	4	7	46	53	53
2013/02/24	4	7	46	53	53
2013/02/25	4	7	46	53	53
2013/02/26	4	7	46	53	53
2013/02/27	5	7	46	53	53
2013/02/28	4	7	46	53	53
2013/03/01	4	7	46	53	53
2013/03/02	4	7	46	53	53
2013/03/03	4	7	46	53	53
2013/03/04	4	7	46	53	53
2013/03/05	4	7	46	53	53
2013/03/06	4	7	46	53	53

52. Facility Service Restriction Report

Report Category: Facility

Access Via: Facility Navigator

User Access Group: All Facility Users who can view or update Service Restrictions

Description:

This Facility based report shows all service restrictions active at any time within a specified date range based upon the restriction's start and potential end date. The default restriction start dates has a range of the last 60 calendar days (as a default setting but can be changed by the user). The default restriction end dates has a range of the last 60 calendar days also (as a default setting but can also be changed by the user). There is no maximum reporting date ranges size setting here. The beginning of the report also displays Facility profile and report parameter information.

Report Parameters:

Start Date From	(the earliest date of the start date of the service restrictions to report, default is 60 days before the current date)
Start Date To	(the latest date of the start date of the service restrictions to report, default is today)
End Date From	(the earliest date of the end date of the service restrictions to report, default is 60 days prior to today)
End Date To	(the latest date of the potential end date of the service restrictions to report, default is today)
Status	(current status of the service restriction: <i>blank</i> meaning all, <i>in progress</i> , <i>completed</i> , <i>terminated early</i>)

There are NO Maximum Reporting Date Range limits in this report.

Report Detail (Fields):

Program	(program name)
Client ID	(SMIS client identifier)
Client Name	(lastname, firstname of client)
Restriction Reason	(reason for the service restriction)
Date	(the start date of the service restriction)
Duration (DAYS)	(the original duration of the service restriction)
Status	(current status of the service restriction: <i>in progress, completed, terminated early</i>)

Export Options: [Excel](#), [PDF](#)

Report Header:

Facility - Service Restriction Report

This report indicates each service restriction recorded within the range identified.


Reporting Period: 2012/02/1 – 2012/04/10	<i>From dates entered below</i>
---	---------------------------------

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Facility phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the facility</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Start Date From	2012/02/11	End Date From	2012/04/10	Status
To	2012/04/10	To	2012/04/10	<i>Search can go back 90 days</i>
	Identifies range of service restriction start dates		Identifies range of service restriction end dates	

Report Sample Screen:

Facility - Service Restriction Report - Windows Internet Explorer



Facility - Service Restriction Report

Print Close

Printed: 2013/03/25

Restriction Start Date: 2012/02/11 - 2012/07/10, Restriction End Date: 2012/04/10 - 2013/07/10, Status:

Name:	Christie Ossington Men's Hostel	Shelter:	Christie Ossington Men's Hostel
Description:	Emergency Shelter	Contact:	
Sector ID:	1	Phone:	
Status:	Active	Health Information Custodian:	No

Start Date From

2012/02/11

End Date From

2012/04/10

Status

To

2012/07/10

To

2013/07/10

Search

Program:

Program Type:

Excel PDF

Program	Client ID	Client Name	Restriction Reason	Date	Duration (DAYS)	Status	Early Termination By
Christie Ossington Men's Hostel			Assault of client	2012/06/15 12:20:44 PM	90	completed	,
Christie Ossington Men's Hostel			Disruptive behaviour	2012/06/15 12:20:58 PM	7	completed	,
Christie Ossington Men's Hostel			Disruptive behaviour	2012/06/15 12:21:20 PM	7	completed	,
Christie Ossington Men's Hostel			Not following case plan	2012/06/15 12:21:40 PM	1	completed	,

4 items found, displaying all items.

53. Facility PNA To Be Paid Report

Report Category: Facility

Access Via: Facility Navigator - Financial

User Access Group: All Facility Users who has access to SMIS Financials

Description:

This Facility based report shows the current PNA liability of the Facility. It lists all the amount owing to clients who have been deemed PNA eligible by staff and have not collected the listed PNA amounts from the last 37 calendar days prior to today. Note that any PNA amounts owing older than 37 days are not included in this report since they are no longer eligible to be given out. The beginning of the report also displays Facility profile information.

Report Parameters:

None

Report Detail (Fields):

Summary Block

Total Clients	(total number of clients owing PNA to)
Total Bed Nights	(total number of bed nights of PNA owing to all eligible clients that have not been collected within the last 37 days)
Total Balance	(the current total amount – liability – of PNA owing)

Detailed Table

Program	(program name)
Client No.	(SMIS client number)
Last Name	(lastname of client)
First Name	(firstname of client)
Last Admission Date	(the latest admission date of the client)
Bed Night	(total number of bed night of PNA owing to the client)
Balance	(total \$ amount of PNA owing to the client)
Discharged	(shows whether the client is discharged or not: <i>discharged, active</i>)

Export Options: [Excel](#), [PDF](#)

Report Header:


Facility PNA To Be Paid Report

This report provides the list of all clients whose eligibility has been checked, and they have stayed at the shelter and therefore PNA is owed to them. The clients on this may not currently be staying at the shelter, but they have PNA owed to them from the period identified in the report

Reporting Period: 2012/04/10		Registers the date the report is run	
This is the facility information populated automatically			
Name	Shelter name – Bedded program	Facility	Facility Name
Description	Client group described	Phone	Facility phone number
Health Information Custodian	Yes / No	Type	Type of program – bedded
Status	Active	Space Capacity	Total # of beds in the facility
Funding Capacity:	Max. # of funded beds based upon Shelter Operating Agreement	Male/Female	Client group
Minimum Age	0	Maximum Age	100

Report Sample Screen:

PNA To Be Paid Report - Windows Internet Explorer



PNA To Be Paid Report

Print Close

Printed: 2013/03/25

Reporting Period: 2013/03/25

Name:	Christie Ossington Men's Hostel	Facility:	Christie Ossington Men's Hostel
Description:	Single Men's	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	53
Funding Capacity:	53	Male/Female:	Male
Minimum Age:	18	Maximum Age:	65

Total Client	7
Total Bed Night	114
Total Balance	\$490.20

Excel PDF

Client No.	Last Name	First Name	Last Admission Date	Bed Night	Balance	Discharged
			2010/04/27	15	\$64.50	Active
			2010/08/03	15	\$64.50	Active
			2010/02/26	15	\$64.50	Active
			2010/05/11	15	\$64.50	Active
			2010/06/22	15	\$64.50	Active
			2012/10/25	24	\$103.20	Active
			2013/01/11	15	\$64.50	Active

7 items found, displaying all items.

54. Facility Client Safekeeping Balances Report

Report Category: Facility

Access Via: Facility Navigator - Financial

User Access Group: All Facility Users who has access to SMIS Financials

Description:

This Facility based report shows the current Client Safekeeping Funds (CSF) liability of the Facility as of a specified date (defaulted to today but can be changed by the user). It lists all the amount owing to clients who have balances of \$ safekeeping funds with the Shelter as of the specified date. The beginning of the report also displays Facility profile information.

Report Parameters:

End Date	(the reporting date at which the CSF liability is calculated)
----------	---

Report Detail (Fields):

Summary Block

Total Clients	(total number of clients owing CSF to)
Total Balance	(the current total amount – liability – of CSF owing)

Detailed Table

Program	(program name)
Client No.	(SMIS client number)
Last Name	(lastname of client)
First Name	(firstname of client)
First Trans Date	(date of the first transaction done for the client depending upon the specified End Date parameter)
Last Trans Date	(date of the latest transaction done for the client depending upon the specified End Date parameter)
Balance	(total \$ amount of CSF owing to the client)
Currently Active	(shows whether the client is currently active in the program of not: Yes, No)

Export Options: [Excel](#), [PDF](#)

Report Header:

Facility Client Safekeeping Balances Report


Reporting Period: 2012/04/10	<i>Registers the date the report is run</i>
-------------------------------------	---

End Date	2012/04/10 search	<i>Enter the date you are running the report, and this will include all client safekeeping balances held as of that date</i>
----------	-------------------	--

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Facility phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>
Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the facility</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Report Sample Screen:


Client Safekeeping Balance Report - Windows Internet Explorer




Client Safekeeping Balance Report
Print Close

Printed: 2013/03/25

Reporting Period: 2013/03/25

End Date: 2013/03/25  Search

Name:	Christie Ossington Men's Hostel	Facility:	Christie Ossington Men's Hostel
Description:	Single Men's	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	53
Funding Capacity:	53	Male/Female:	Male
Minimum Age:	18	Maximum Age:	65
Total Client	3		
Total Balance	\$1,065.00		

 Excel
 PDF

Client No.	Last Name	First Name	First Trans Date	Last Trans Date	Balance	Currently Active
			2011/10/27	2011/10/27	\$50.00	Yes
			2011/05/16	2011/06/02	\$15.00	Yes
			2011/01/18	2011/01/18	\$1,000.00	Yes

3 items found, displaying all items.

55. Facility Exception Report

Report Category: Facility

Access Via: Facility Navigator - Financial

User Access Group: Supervisor & Manager Roles

Description:

This Facility based report shows all the financial related exceptions for the Facility as of a specified date range. The default range is of the last 60 days and can be globally changed. There is no maximum size to the date range. It lists all the transaction reversals, allowance override thru Give Allowance advance function, and Client Safekeeping Funds balances greater than a designated threshold amount (currently set to \$2000) as of the reporting End Date. The beginning of the report also displays Facility profile information.

Report Parameters:

Start Date	(the reporting start date)
End Date	(the reporting to date)

Report Detail (Fields):

Program	(program name)
Date	(date and time of the financial transaction)
ID	(transaction ID)
Type	(transaction type: <i>Reverse, Allowance Override, CSF</i>)
Detail	(detail of the transaction incl. give allowance reasons for PNA or FA, corresponding reversed transaction ID)
Amount	(the amount of the transaction)
User Name	(the user who created the transaction)
Client ID	(SMIS client ID)
Client Name	(lastname and firstname of client)
Note	(note created during and regarding the transaction)

Export Options: [Excel](#), [PDF](#)

Report Header:

Exception Report

Reporting Period: according to dates entered below


Name	<i>Shelter name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Facility phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>

Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the facility</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Start Date		End Date		Search
------------	--	----------	--	--------

Report Sample Screen:

Exception Report - Windows Internet Explorer



Exception Report

Print Close

Printed: 2012/10/26

Reporting Period: 2012/01/01 - 2012/06/29

Facility:	Birkdale Residence	Shelter:	Birkdale Residence
Description:	mothers and children	Contact:	
Type:	Families	Phone:	
Status:	Active		

Start Date: 2012/01/01 End Date: 2012/06/29 Search

[Excel](#) [PDF](#)

Program	Date	ID	Type	Detail	Amount	User Name	Client ID	Client Name	Note
Birkdale Residence - Bedded Program	2012/05/09 09:41:34 AM		Reverse	Original TxID : Created 2012/05/09 09:40:27 AM	-\$198.70				
Birkdale Residence - Bedded Program	2012/06/08 04:02:28 PM		Reverse	Reason : PNA Reason 2	-\$100.00				
Birkdale Residence - Bedded Program	2012/06/22 03:42:46 PM		Reverse	Reason : PNA Reason 1	-\$99.99				
Birkdale Residence - Bedded Program	2012/05/02 10:43:43 AM		Reverse	Original TxID : Created 2012/04/18 12:47:47 PM	-\$14.00				
Birkdale Residence - Bedded Program	2012/04/18 01:12:07 PM		Allowance Override	Reason : PNA Reason 1	\$99.00				
Birkdale Residence - Bedded Program	2012/06/22 03:42:24 PM		Allowance Override	Reason : PNA Reason 1	\$99.99				
Birkdale Residence - Bedded Program	2012/05/09 09:37:54 AM		Reverse	Original TxID : Created 2012/04/18 12:43:36 PM	-\$123.10				
Birkdale Residence - Bedded Program	2012/03/22 10:21:02 AM		Allowance Override	Reason : FA Reason 1	\$9.00				
Birkdale Residence - Bedded Program	2012/05/02 02:55:26 PM		Reverse	Original TxID : Created 2012/05/02 02:55:09 PM	\$10.00				
Birkdale Residence - Bedded Program	2012/06/08 04:02:00 PM		Allowance Override	Reason : PNA Reason 2	\$100.00				
Birkdale Residence - Bedded Program			CSF	Greater than Threshold	\$100,070.89				
Birkdale Residence - Bedded Program			CSF	Greater than Threshold	\$7,183.30				

12 items found, displaying all items.

56. Facility Eligibility Report

Report Category: Facility

Access Via: Facility Navigator - Financial

User Access Group: All Facility Users who has access to SMIS Financials

Description:

This Facility based report shows the list of clients who has stayed at least 1 day in the last 14 days, and is missing an eligibility assessment record that covers that day(s). This means SMIS does not know if the client will be eligible for PNA or not for the missing eligibility. The reason 14 days is used is because a user can only create an eligibility assessment record going back 14 days. The beginning of the report also displays Facility profile information.

Report Parameters:

None

Report Detail (Fields):

Program	(program name)
Client Id	(SMIS client number)
Client Name	(lastname and firstname of client)
Admission Status	(the current admission status of the client)
Admission Date	(the latest admission date of the client)
Discharge Date	(the latest discharge date of the client)
Primary Worker Name	(the name of the primary worker assigned to the client via the Admissions screen)

Export Options: [Excel](#), [PDF](#)

Report Header:

Eligibility Report

This report indicates each service restriction recorded within the range identified.


Reporting Period: 2012/04/10	<i>Enters the date the report is run</i>
-------------------------------------	--

This is the facility information populated automatically			
Name	<i>Shelter name – Bedded program</i>	Facility	<i>Facility Name</i>
Description	<i>Client group described</i>	Phone	<i>Facility phone number</i>
Health Information Custodian	<i>Yes / No</i>	Type	<i>Type of program – bedded</i>

Status	<i>Active</i>	Space Capacity	<i>Total # of beds in the Facility</i>
Funding Capacity:	<i>Max. # of funded beds based upon Shelter Operating Agreement</i>	Male/Female	<i>Client group</i>
Minimum Age	<i>0</i>	Maximum Age	<i>100</i>

Report Sample Screen:

Eligibility Report - Windows Internet Explorer



Eligibility Report

Print Close

Printed: 2013/03/25

Reporting Period: 2013/03/25

Name:	Christie Ossington Men's Hostel	Facility:	Christie Ossington Men's Hostel
Description:	Single Men's	Phone:	
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	45
Funding Capacity:	45	Male/Female:	Male
Minimum Age:	18	Maximum Age:	67

Excel PDF

Client Id	Client Name	Admission Status	Admission Date	Discharge Date	Primary Worker Name
		Active	2012/03/29		
		Active	2012/11/05		W., Kerrian
		Active	2011/07/11		
		Active	2010/12/03		
		Active	2013/03/03		
		Active	2010/01/28		
		Active	2012/06/04		
		Active	2012/09/20		
		Inactive	2012/11/18	2013/03/14	G., AnnMarie
		Active	2013/03/14		

57. Shelter Financial Report

A NEW Shelter financial Report has been added to the Shelter Navigator. This Screen displays all financial transaction summary and details for the Shelter based upon a user specified date range (default can be set system-wide). Summary and details can be shown for various disbursement types by Date, Client, Program or transaction Detail, as well as breakdown by users against various clients. This Report can also be exported to Microsoft Excel or PDF formats. See figures of the main report and sub-reports screen below for more details. *Financial staff Roles who performs Transactions or Advanced Financial functions will be able to run this report.*

Report Category: Shelter

Access Via: Shelter Navigator - Financial

User Access Group: All Shelter Users who has access to SMIS Financials

Description:

This Shelter financial Report has been added to the Shelter Navigator. This Screen displays all financial transaction summary and details for the Shelter based upon a user specified date range (default can be set system-wide). Summary and details can be shown for various disbursement types by Date, Client, Program or transaction Detail, as well as breakdown by users against various clients. The beginning of the report also displays Shelter profile information.

Report Parameters:

Start Date	(the reporting start date)
End Date	(the reporting to date)

Report Detail (Fields):

Disbursement Type Summary Block

Disb. Type	(disbursement type: <i>Client Safekeeping, Food Allowance, Personal Needs Allowance</i>)
Amount	(subtotal for each disbursement type for the specified date range)
View By	(user specified further financial details to display:
Date	<i>day-by-day breakdown of the disbursement type financial details,</i>
Client	<i>client-by-client breakdown of the disbursement type financial details,</i>
Detail	<i>most detailed breakdown of the disbursement type financial sub-transaction details,</i>
Total >Detail	<i>give detailed breakdown by complete transactions including all disbursement types</i>

[Note that for each Disbursement Type, a user can further select a View By Date, Client or Detail breakdown of the transactions. And for Total of all Disbursement Types, a user can select Detail view of complete transactions (where each transaction displayed then may contain multiple disbursement types) User can also select to view transactions by disbursement type, date or all details done by each user separately.]

Cash vs. Cheque Summary Block

CASH	(all cash related transaction subtotals)
CHEQUES	(all issued cheque related transaction subtotals)
Normal	(all non-reversal type transactions involving money)
Reversal	(all reversal type transactions involving money)
In (On Hand)	(all incoming moneys to the Shelter)
In (Withheld)	(all withheld moneys from clients to the Shelter)
Out (On Hand)	(all outflow of moneys from the Shelter)


Detailed Table

Date	(Date of transaction)
Disb. Type	(disbursement type: <i>Client Safekeeping, Food Allowance, Personal Needs Allowance</i>)
CSF Type	(client safekeeping fund type: <i>Deposit [Cash], Withdraw, Deposit [Cheque]</i>)
Amount	(the \$ amount of the (sub-)transaction)
User Name	(name of the user who processed the transaction)
Trans. Type	(transaction type: <i>Regular, Allowance Override, Not To Be Paid, Reverse</i>)
Paid By	(payment vehicle: <i>CASH, CHEQUE [cheque #], blank if not money related transaction</i>)
ID	(transaction ID)
Client ID	(SMIS Client ID)
Client Name	(Client last name, then first name)

Export Options: Excel, PDF

Below is the main Shelter Financial Report screen:

ShelterFinancialReport - Windows Internet Explorer


Shelter Financial Report

Print
Close

Printed: 2012/10/29

Reporting Period: 2011/06/29 - 2012/06/29

Name:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Start Date: 2011/06/29
End Date: 2012/06/29
Search

Disb. Type	Amount	View By
Client Safekeeping	-\$5,597.75	Date Client Program Detail
Food Allowance	\$221.00	Date Client Program Detail
Personal Needs Allowance	\$667.19	Date Client Program Detail
Total	-\$4,709.56	Detail Program

	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$5,689.36	\$986.59	\$206.89	\$518.30
In (Withheld)	\$138.50		\$18.00	
Out (On Hand)	\$1,740.08	\$348.00	\$337.00	\$0.00
Out(Withheld)		\$423.00		\$0.00
Total	\$4,087.78	\$215.59	-\$112.11	\$518.30
Grand Total		\$4,303.37		\$406.19


Excel
PDF

User Id	User Name	Amount	View By
		-\$4,866.97	Type Date Detail
		\$212.90	Type Date Detail
		\$38.40	Type Date Detail
		-\$93.89	Type Date Detail

4 items found, displaying all items.

Below is the PNA by Date sub-report screen:

ShelterFinancialSummaryReport - Windows Internet Explorer



Shelter Financial Summary Report
Type Date

Print Return

Printed: 2012/10/29

Reporting Period: 2011/06/29 - 2012/06/29

Name:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Disb. Type	Amount
Personal Needs Allowance	\$667.19
Total	\$667.19


	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$0.00	\$552.59	\$0.00	\$90.30
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$1,138.08	\$0.00	\$172.00	\$0.00
Out (Withheld)		\$0.00		\$0.00
Total	-\$1,138.08	\$552.59	-\$172.00	\$90.30
Grand Total		-\$585.49		-\$81.70

Excel PDF

Date	Disb. Type	Amount
2011/07/05	Personal Needs Allowance	\$393.99
2011/07/07	Personal Needs Allowance	\$94.60
2011/07/11	Personal Needs Allowance	\$34.40
2011/07/14	Personal Needs Allowance	\$(154.80)
2011/07/18	Personal Needs Allowance	\$(90.30)
2011/08/05	Personal Needs Allowance	\$100.00
2011/09/06	Personal Needs Allowance	\$51.60
2011/10/28	Personal Needs Allowance	\$100.00
2012/04/10	Personal Needs Allowance	\$38.70
2012/04/18	Personal Needs Allowance	\$172.10
2012/05/02	Personal Needs Allowance	\$0.00
2012/05/09	Personal Needs Allowance	\$(73.10)
2012/06/08	Personal Needs Allowance	\$0.00
2012/06/22	Personal Needs Allowance	\$0.00

Below is the PNA by Client detailed sub-report screen:

ShelterFinancialSummaryReport - Windows Internet Explorer



Shelter Financial Summary Report
Type Client

Print Return

Printed: 2012/10/29

Reporting Period: 2011/06/29 - 2012/06/29

Name:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Disb. Type	Amount
Personal Needs Allowance	\$667.19
Total	\$667.19


	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$0.00	\$552.59	\$0.00	\$90.30
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$1,138.08	\$0.00	\$172.00	\$0.00
Out (Withheld)		\$0.00		\$0.00
Total	-\$1,138.08	\$552.59	-\$172.00	\$90.30
Grand Total		-\$585.49		-\$81.70

Excel PDF

Disb. Type	Amount	Client Id	Client Name
Personal Needs Allowance	\$137.70		
Personal Needs Allowance	\$0.00		
Personal Needs Allowance	\$60.20		
Personal Needs Allowance	\$60.20		
Personal Needs Allowance	\$126.29		
Personal Needs Allowance	\$364.50		
Personal Needs Allowance	\$12.90		
Personal Needs Allowance	\$(81.70)		
Personal Needs Allowance	\$(81.70)		
Personal Needs Allowance	\$68.80		
Personal Needs Allowance	\$0.00		
Personal Needs Allowance	\$0.00		

Below is the PNA by Programs within the Shelter detailed sub-report screen:

ShelterFinancialSummaryReport - Windows Internet Explorer



Shelter Financial Summary Report
Type Program

Print Return

Printed: 2012/10/29

Reporting Period: 2011/06/29 - 2012/06/29

Name:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Disb. Type	Amount
Personal Needs Allowance	\$667.19
Total	\$667.19


	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$0.00	\$552.59	\$0.00	\$90.30
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$1,138.08	\$0.00	\$172.00	\$0.00
Out(Withheld)		\$0.00		\$0.00
Total	-\$1,138.08	\$552.59	-\$172.00	\$90.30
Grand Total		-\$585.49		-\$81.70

Excel PDF

Program	Disb. Type	Amount
Birkdale Residence - Bedded Program	Personal Needs Allowance	\$667.19

Below is the PNA by Transaction Details sub-report screen:

ShelterFinancialDetailReport - Windows Internet Explorer



Shelter Financial Detail Report
Type Detail

Print Return

Printed: 2012/10/29

Reporting Period: 2011/06/29 - 2012/06/29

Name:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Disb. Type	Amount
Personal Needs Allowance	\$667.19
Total	\$667.19


	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$0.00	\$552.59	\$0.00	\$90.30
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$1,138.08	\$0.00	\$172.00	\$0.00
Out (Withheld)		\$0.00		\$0.00
Total	-\$1,138.08	\$552.59	-\$172.00	\$90.30
Grand Total		-\$585.49		-\$81.70

Excel PDF

Date	Program	Disb. Type	C/SF Type	Amount	User Name	Trans. Type	Paid By	ID	Client id	Client Name
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$30.10		Regular	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$30.10		Regular	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$12.90		Regular	CHEQUE [dfsfasdfas]			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$0.00		Not To Be Paid				
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$2.36		Allowance Override	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$12.90		Allowance Override	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$100.00		Allowance Override	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$100.00		Allowance Override	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$5.63		Allowance Override	CASH			

Below is the User vs. Disbursement Type Details sub-report screen:

ShelterFinancialSummaryReport - Windows Internet Explorer



Shelter Financial Summary Report
User Type

Print Return

Reporting Period: 2011/06/29 - 2012/06/29

Name:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Disb. Type	Amount	CASH		CHEQUES	
		Normal	Reversals	Normal	Reversals
Client Safekeeping	-\$5,230.56				
Food Allowance	\$77.00				
Personal Needs Allowance	\$286.59				
Total	-\$4,866.97				


	Normal	Reversals	Normal	Reversals
In (On Hand)	\$5,574.36	\$986.59	\$0.00	\$518.30
In (Withheld)	\$106.20		\$0.00	
Out (On Hand)	\$1,422.98	\$348.00	\$124.50	\$0.00
Out(Withheld)		\$423.00		\$0.00
Total	\$4,257.58	\$215.59	-\$124.50	\$518.30
Grand Total		\$4,473.17		\$393.80

Excel PDF

User Name	Disb. Type	Amount
	Client Safekeeping	\$(5,230.56)
	Food Allowance	\$77.00
	Personal Needs Allowance	\$286.59

Below is the User Transaction Details by Date sub-report screen:

ShelterFinancialSummaryReport - Windows Internet Explorer



Shelter Financial Summary Report
User Date

Print Return

Reporting Period: 2011/06/29 - 2012/06/29

Name:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Disb. Type	Amount
Client Safekeeping	-\$5,230.56
Food Allowance	\$77.00
Personal Needs Allowance	\$286.59
Total	-\$4,866.97


	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$5,574.36	\$986.59	\$0.00	\$518.30
In (Withheld)	\$106.20		\$0.00	
Out (On Hand)	\$1,422.98	\$348.00	\$124.50	\$0.00
Out (Withheld)		\$423.00		\$0.00
Total	\$4,257.58	\$215.59	-\$124.50	\$518.30
Grand Total		\$4,473.17		\$393.80

Excel PDF

User Name	Date	Amount
	2011/07/05	\$107.99
	2011/07/08	\$128.00
	2011/07/14	\$145.84
	2011/07/18	\$(480.30)
	2011/07/28	\$(5,001.00)
	2011/08/05	\$100.00
	2011/09/06	\$80.80
	2011/10/18	\$5.00
	2011/10/28	\$100.00
	2012/03/22	\$9.00
	2012/04/10	\$(161.30)
	2012/04/18	\$236.10
	2012/05/02	\$(14.00)
	2012/05/09	\$(123.10)
	2012/06/08	\$0.00
	2012/06/22	\$0.00

Below is the User Transaction Details sub-report screen:

ShelterFinancialDetailReport - Windows Internet Explorer



Shelter Financial Detail Report
User Detail

Print Return

Reporting Period: 2011/06/29 - 2012/06/29

Printed: 2012/10/29

Name:	Birkdale Residence	Organization:	City of Toronto
Description:	mothers and children; refugee claimants	Contact:	
Type:		Phone:	
Status:	Active		

Disb. Type	Amount
Client Safekeeping	-\$5,230.56
Food Allowance	\$77.00
Personal Needs Allowance	\$286.59
Total	-\$4,866.97

	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$5,574.36	\$986.59	\$0.00	\$518.30
In (Withheld)	\$106.20		\$0.00	
Out (On Hand)	\$1,422.98	\$348.00	\$124.50	\$0.00
Out (Withheld)		\$423.00		\$0.00
Total	\$4,257.58	\$215.59	-\$124.50	\$518.30
Grand Total		\$4,473.17		\$393.80

Excel PDF

Date	Program	Disb. Type	C/SF Type	Amount	User Name	Trans. Type	Paid By	ID	Client ID	Client Name
2011/07/05	Birkdale Residence - Bedded Program	Client Safekeeping	Deposit [Cash]	\$(106.20)		Regular	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Client Safekeeping	Deposit [Cash]	\$(10.00)		Regular	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Food Allowance		\$28.00		Regular	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Food Allowance		\$28.00		Regular	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$30.10		Regular	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$30.10		Regular	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$0.00		Not To Be Paid				
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$100.00		Allowance Override	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$2.36		Allowance Override	CASH			
2011/07/05	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$5.63		Allowance Override	CASH			
2011/07/08	Birkdale Residence - Bedded Program	Food Allowance		\$28.00		Allowance Override	CASH			

58. Facility Financial Report

A NEW Facility financial Report has been added to the Facility Navigator. This Screen displays all financial transaction summary and details for the Shelter based upon a user specified date range (default can be set system-wide). Summary and details can be shown for various disbursement types by Date, Client, Program or transaction Detail, as well as breakdown by users against various clients. This Report can also be exported to Microsoft Excel or PDF formats. See figures of the main report and sub-reports screen below for more details. *Financial staff Roles who performs Transactions or Advanced Financial functions will be able to run this report.*

Report Category: Shelter

Access Via: Shelter Navigator - Financial

User Access Group: All Shelter Users who has access to SMIS Financials

Description:

The Facility financial Report has been added to the Facility Navigator. This Screen displays all financial transaction summary and details for the Facility based upon a user specified date range (default can be set system-wide). Summary and details can be shown for various disbursement types by Date, Client, Program or transaction Detail, as well as breakdown by users against various clients. The beginning of the report also displays Facility profile information.

Report Parameters:

Start Date	(the reporting start date)
End Date	(the reporting to date)

Report Detail (Fields):

Disbursement Type Summary Block

Disb. Type	(disbursement type: <i>Client Safekeeping, Food Allowance, Personal Needs Allowance</i>)
Amount	(subtotal for each disbursement type for the specified date range)
View By	(user specified further financial details to display:
Date	<i>day-by-day breakdown of the disbursement type financial details,</i>
Client	<i>client-by-client breakdown of the disbursement type financial details,</i>
Detail	<i>most detailed breakdown of the disbursement type financial sub-transaction details,</i>
Total >Detail	<i>give detailed breakdown by complete transactions including all disbursement types</i>

[Note that for each Disbursement Type, a user can further select a View By Date, Client or Detail breakdown of the transactions. And for Total of all Disbursement Types, a user can select Detail view of complete transactions (where each transaction displayed then may contain multiple disbursement types) User can also select to view transactions by disbursement type, date or all details done by each user separately.]

Cash vs. Cheque Summary Block


CASH	(all cash related transaction subtotals)
CHEQUES	(all issued cheque related transaction subtotals)
Normal	(all non-reversal type transactions involving money)
Reversal	(all reversal type transactions involving money)
In (On Hand)	(all incoming moneys to the Facility)
In (Withheld)	(all withheld moneys from clients to the Facility)
Out (On Hand)	(all outflow of moneys from the Facility)

Detailed Table

Date	(Date of transaction)
Disb. Type	(disbursement type: <i>Client Safekeeping, Food Allowance, Personal Needs Allowance</i>)
CSF Type	(client safekeeping fund type: <i>Deposit [Cash], Withdraw, Deposit [Cheque]</i>)
Amount	(the \$ amount of the (sub-)transaction)
User Name	(name of the user who processed the transaction)
Trans. Type	(transaction type: <i>Regular, Allowance Override, Not To Be Paid, Reverse</i>)
Paid By	(payment vehicle: <i>CASH, CHEQUE [cheque #], blank if not money related transaction</i>)
ID	(transaction ID)
Client ID	(SMIS Client ID)
Client Name	(Client last name, then first name)

Export Options: Excel, PDF

Below is the main Facility Financial Report screen:





Facility Financial Report

Print Close



Printed: 2013/09/19

Reporting Period: 2012/01/01 - 2012/03/31

Name:	Birkdale Residence	Shelter:	Birkdale Residence
Description:	mothers and children	Contact:	
Sector ID:	3	Phone:	
Status:	Active		

Start Date: 2012/01/01  End Date: 2012/03/31  Search


Disb. Type	Amount	View By		CASH		CHEQUES	
				Normal	Reversals	Normal	Reversals
Client Safekeeping	\$1,138.25	Date Client Program Detail					
Food Allowance	\$43,904.00	Date Client Program Detail	In (On Hand)	\$1,821.00	\$103.20	\$210.00	\$6,768.20
Personal Needs Allowance	\$31,697.60	Date Client Program Detail	In (Withheld)	\$10,528.80		\$0.00	
			Out (On Hand)	\$10,007.95	\$10.00	\$85,799.10	\$210.00
			Out(Withheld)		\$144.00		\$0.00
Total	\$76,739.85	Detail Program	Total	\$2,341.85	-\$50.80	-\$85,589.10	\$6,558.20
			Grand Total		\$2,291.05		-\$79,030.90

 [Excel](#)  [PDF](#)

User Id	User Name	Amount	View By
		\$3,058.90	Type Date Detail
		\$39,041.40	Type Date Detail
		\$6,806.15	Type Date Detail
		\$414.40	Type Date Detail
		\$21,844.40	Type Date Detail
		\$2,542.20	Type Date Detail
		\$9.40	Type Date Detail
		\$100.00	Type Date Detail
		\$596.00	Type Date Detail
		\$2,327.00	Type Date Detail

10 items found, displaying all items.

Below is the PNA by Date sub-report screen:



Facility Financial Summary Report

Type Date

Print Return

Printed: 2013/09/19

Reporting Period: 2012/01/01 - 2012/03/31

Name:	Birkdale Residence	Shelter:	Birkdale Residence
Description:	mothers and children	Contact:	
Sector ID:	3	Phone:	
Status:	Active		

Disb. Type	Amount
Personal Needs Allowance	\$31,697.60
Total	\$31,697.60

	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$0.00	\$79.20	\$0.00	\$2,182.40
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$1,086.80	\$0.00	\$32,872.40	\$0.00
Out(Withheld)		\$0.00		\$0.00
Total	-\$1,086.80	\$79.20	-\$32,872.40	\$2,182.40
Grand Total		-\$1,007.60		-\$30,690.00

[Excel](#) [PDF](#)

Date	Disb. Type	Amount
2012/01/04	Personal Needs Allowance	\$2,477.20
2012/01/05	Personal Needs Allowance	\$101.20
2012/01/06	Personal Needs Allowance	\$196.00
2012/01/09	Personal Needs Allowance	\$79.20
2012/01/11	Personal Needs Allowance	\$1,980.00
2012/01/12	Personal Needs Allowance	\$74.80
2012/01/14	Personal Needs Allowance	\$88.00
2012/01/15	Personal Needs Allowance	\$52.80
2012/01/18	Personal Needs Allowance	\$1,962.40
2012/01/19	Personal Needs Allowance	\$13.20
2012/01/20	Personal Needs Allowance	\$(22.00)
2012/01/25	Personal Needs Allowance	\$2,173.60
2012/01/26	Personal Needs Allowance	\$286.00
2012/02/01	Personal Needs Allowance	\$2,235.20
2012/02/02	Personal Needs Allowance	\$171.60
2012/02/03	Personal Needs Allowance	\$39.60
2012/02/06	Personal Needs Allowance	\$13.20
2012/02/07	Personal Needs Allowance	\$0.00
2012/02/08	Personal Needs Allowance	\$2,046.00
2012/02/09	Personal Needs Allowance	\$158.40
2012/02/10	Personal Needs Allowance	\$61.60
2012/02/13	Personal Needs Allowance	\$66.00
2012/02/14	Personal Needs Allowance	\$0.00
2012/02/15	Personal Needs Allowance	\$2,217.60
2012/02/22	Personal Needs Allowance	\$2,213.20
2012/02/24	Personal Needs Allowance	\$8.80

Below is the PNA by Client detailed sub-report screen:



Facility Financial Summary Report

Type Client

Print Return

Printed: 2013/09/19

Reporting Period: 2012/01/01 - 2012/03/31

Name:	Birkdale Residence	Shelter:	Birkdale Residence
Description:	mothers and children	Contact:	
Sector ID:	3	Phone:	
Status:	Active		


Disb. Type	Amount
Personal Needs Allowance	\$31,697.60
Total	\$31,697.60

	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$0.00	\$79.20	\$0.00	\$2,182.40
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$1,086.80	\$0.00	\$32,872.40	\$0.00
Out(Withheld)		\$0.00		\$0.00
Total	-\$1,086.80	\$79.20	-\$32,872.40	\$2,182.40
Grand Total		-\$1,007.60		-\$30,690.00

[Excel](#) [PDF](#)

Disb. Type	Amount	Client Id	Client Name
Personal Needs Allowance	\$52.80		
Personal Needs Allowance	\$118.80		
Personal Needs Allowance	\$26.40		
Personal Needs Allowance	\$26.40		
Personal Needs Allowance	\$66.00		
Personal Needs Allowance	\$268.40		
Personal Needs Allowance	\$0.00		
Personal Needs Allowance	\$0.00		
Personal Needs Allowance	\$61.60		
Personal Needs Allowance	\$79.20		
Personal Needs Allowance	\$123.20		
Personal Needs Allowance	\$215.60		
Personal Needs Allowance	\$330.00		
Personal Needs Allowance	\$176.00		
Personal Needs Allowance	\$180.40		
Personal Needs Allowance	\$180.40		

Below is the PNA by Programs within the Facility detailed sub-report screen:



Facility Financial Summary Report

Type Program

[Print](#) [Return](#)

Printed: 2013/09/19


Reporting Period: 2012/01/01 - 2012/03/31				
Name:	Birkdale Residence	Shelter:	Birkdale Residence	
Description:	mothers and children	Contact:		
Sector ID:	3	Phone:		
Status:	Active			

Disb. Type	Amount	CASH		CHEQUES	
		Normal	Reversals	Normal	Reversals
Personal Needs Allowance	\$31,697.60				
Total	\$31,697.60				

Program	Disb. Type	Amount
Birkdale Residence - Bedded Program	Personal Needs Allowance	\$31,697.60

[Excel](#) [PDF](#)

Below is the PNA by Transaction Details sub-report screen:



Facility Financial Detail Report

Type Detail

[Print](#) [Return](#)

Printed: 2013/09/19

Reporting Period: 2012/01/01 - 2012/03/31

Name:	Birkdale Residence	Shelter:	Birkdale Residence
Description:	mothers and children	Contact:	
Sector ID:	3	Phone:	
Status:	Active		

Disb. Type	Amount
Personal Needs Allowance	\$31,697.60
Total	\$31,697.60

	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$0.00	\$79.20	\$0.00	\$2,182.40
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$1,086.80	\$0.00	\$32,872.40	\$0.00
Out(Withheld)		\$0.00		\$0.00
Total	-\$1,086.80	\$79.20	-\$32,872.40	\$2,182.40
Grand Total		-\$1,007.60		-\$30,690.00

[Excel](#) [PDF](#)

Date	Program	Disb. Type	CSF Type	Amount	User Name	Trans. Type	Paid By	ID	Client Id	Client Name
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$(30.80)		Reverse	CHEQUE []	164776		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$(30.80)		Reverse	CHEQUE []	164776		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$30.80		Regular	CHEQUE [156629]	164148		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$30.80		Regular	CHEQUE [156682]	164822		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$30.80		Regular	CHEQUE [156686]	164221		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$17.60		Regular	CHEQUE [156638]	164182		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$26.40		Regular	CHEQUE [156684]	164217		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$13.20		Regular	CHEQUE [156693]	164836		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$4.40		Regular	CHEQUE [156697]	164849		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$30.80		Regular	CHEQUE [156673]	164207		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$17.60		Regular	CHEQUE [156642]	164188		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$30.80		Regular	CHEQUE [156634]	164783		
2012/01/04	Birkdale Residence - Bedded Program	Personal Needs Allowance		\$30.80		Regular	CHEQUE [156677]	164211		



Below is the User vs. Disbursement Type Details sub-report screen:

Reporting Period: 2012/01/01 - 2012/03/31

Name:	Birkdale Residence	Shelter:	Birkdale Residence
Description:	mothers and children	Contact:	
Sector ID:	3	Phone:	
Status:	Active		


Disb. Type	Amount
Client Safekeeping	\$2,130.90
Food Allowance	\$576.00
Personal Needs Allowance	\$352.00
Total	\$3,058.90

	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$410.00	\$0.00	\$10.00	\$1,739.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$1,131.80	\$0.00	\$4,051.10	\$10.00
Out(Withheld)		\$25.00		\$0.00
Total	-\$721.80	-\$25.00	-\$4,041.10	\$1,729.00
Grand Total		-\$746.80		-\$2,312.10

 Excel  PDF

User Name	Disb. Type	Amount
	Client Safekeeping	\$2,130.90
	Food Allowance	\$576.00
	Personal Needs Allowance	\$352.00

Below is the User Transaction Details by Date sub-report screen:



Facility Financial Summary Report

User Date

Print Return

Printed: 2013/09/19

Reporting Period: 2012/01/01 - 2012/03/31

Name:	Birkdale Residence	Shelter:	Birkdale Residence
Description:	mothers and children	Contact:	
Sector ID:	3	Phone:	
Status:	Active		


Disb. Type	Amount
Client Safekeeping	\$2,130.90
Food Allowance	\$576.00
Personal Needs Allowance	\$352.00
Total	\$3,058.90

	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$410.00	\$0.00	\$10.00	\$1,739.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$1,131.80	\$0.00	\$4,051.10	\$10.00
Out(Withheld)		\$25.00		\$0.00
Total	-\$721.80	-\$25.00	-\$4,041.10	\$1,729.00
Grand Total		-\$746.80		-\$2,312.10

[Excel](#) [PDF](#)

User Name	Date	Amount
	2012/01/04	\$181.00
	2012/01/05	\$20.00
	2012/01/10	\$8.00
	2012/01/12	\$(31.00)
	2012/01/17	\$(400.00)
	2012/01/19	\$10.40
	2012/01/22	\$20.00
	2012/01/23	\$16.00
	2012/01/27	\$1,000.00
	2012/01/29	\$20.00
	2012/02/01	\$73.60
	2012/02/02	\$940.90
	2012/02/03	\$379.60
	2012/02/08	\$162.00
	2012/02/09	\$342.40
	2012/02/13	\$156.00
	2012/02/14	\$28.00
	2012/02/18	\$26.00
	2012/02/19	\$45.00
	2012/02/29	\$84.00
	2012/03/06	\$8.00

Below is the User Transaction Details sub-report screen:



Facility Financial Detail Report

User Detail

Print Return

Printed: 2013/09/19

Reporting Period: 2012/01/01 - 2012/03/31

Name:	Birkdale Residence	Shelter:	Birkdale Residence
Description:	mothers and children	Contact:	
Sector ID:	3	Phone:	
Status:	Active		

Disb. Type	Amount
Client Safekeeping	\$2,130.90
Food Allowance	\$576.00
Personal Needs Allowance	\$352.00
Total	\$3,058.90

	CASH		CHEQUES	
	Normal	Reversals	Normal	Reversals
In (On Hand)	\$410.00	\$0.00	\$10.00	\$1,739.00
In (Withheld)	\$0.00		\$0.00	
Out (On Hand)	\$1,131.80	\$0.00	\$4,051.10	\$10.00
Out(Withheld)		\$25.00		\$0.00
Total	-\$721.80	-\$25.00	-\$4,041.10	\$1,729.00
Grand Total		-\$746.80		-\$2,312.10

[Excel](#) [PDF](#)

Date	Program	Disb. Type	CSF Type	Amount	User Name	Trans. Type	Paid By	ID	Client Id	Client Name
2012/01/04	Birkdale Residence - Bedded Program	Client Safekeeping	Withdraw	\$125.00		Regular	CHEQUE [156487]	164882		
2012/01/04	Birkdale Residence - Bedded Program	Food Allowance		\$28.00		Regular	CASH	165131		
2012/01/04	Birkdale Residence - Bedded Program	Food Allowance		\$28.00		Regular	CASH	165131		
2012/01/05	Birkdale Residence - Bedded Program	Client Safekeeping	Withdraw	\$20.00		Regular	CASH	166314		
2012/01/10	Birkdale Residence - Bedded Program	Food Allowance		\$4.00		Regular	CASH	178717		
2012/01/10	Birkdale Residence - Bedded Program	Food Allowance		\$4.00		Regular	CASH	178717		
2012/01/12	Birkdale Residence - Bedded Program	Client Safekeeping	Deposit [Cash]	\$5.00		Reverse	CHEQUE []	183515		
2012/01/12	Birkdale Residence - Bedded Program	Client Safekeeping	Deposit [Cash]	\$10.00		Reverse	CHEQUE []	183316		
2012/01/12	Birkdale Residence - Bedded Program	Client Safekeeping	Deposit [Cheque]	\$10.00		Reverse	CHEQUE []	183716		
2012/01/12	Birkdale Residence - Bedded Program	Client Safekeeping	Deposit [Cash]	\$(10.00)		Regular	CHEQUE [156499]	183319		
2012/01/12	Birkdale Residence - Bedded Program	Client Safekeeping	Deposit [Cheque]	\$(10.00)		Regular	CHEQUE [156498]	183715		
2012/01/12	Birkdale Residence - Bedded Program	Food Allowance		\$(24.00)		Reverse	CHEQUE []	183716		

59. Head Office Dashboard Screen

Report Category: Head Office

Access Via: Head Office Navigator

User Access Group: Selected Head Office Users

Description:

This System level based dashboard like screen shows **real-time** Occupancy, Occupancy by Age, Gender and Sector, Bed Nights, Incidents, Service Restrictions, Complaints and Case Notes aggregate statistics for the entire System (all Programs). The user can also filter by Shelter, Program and/or Program Type.

Note that all Occupancy stats, unless stated as "current" otherwise, are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4 a.m. and update any occupancy changes timely into SMIS.

Report Parameters:

Shelter	filter results by a particular Shelter
Program	filter results by a particular Program in combination with the Shelter parameter above or by just this Program parameter criteria
Program Type	filter by <i>Bed</i> programs or <i>Service</i> programs

Report Detail (Fields): See Report Layout below

Report Layout:

Head Office Dashboard

This screen is accessed through the left side Navigator, once you have selected the "Head Office" icon. This report provides real-time occupancy information.

Only Head Office has the ability to view this dashboard screen according shelter, program and program type.

Shelter:	<i>The arrow on the right will list all shelters in the system. Leaving this section blank produces a system-wide report, including data from all shelters</i>				↓
Program:	<i>The arrow on the right will list all bedded, service and shelter specific programs within the system. Leaving this blank will include data from all programs</i>	↓	Program type:	<i>The arrow on the right allows you to list just bedded or service programs. Leaving this area blank will include data from both.</i>	↓

Occupancy			
Active intakes without admission	<i>This number represents all the active intakes that have not yet been admitted to a shelter. All</i>	Vacancy	<i>This number represents funded capacity less the active admissions or</i>

	<i>intakes that have been active for 18 hours or more and are not admitted to any shelter will expire at midnight each night.</i>		<i>occupancy of all shelter programs and cannot be negative.</i>
Referrals from other shelters	<i>This number represents those people referred to various programs from other shelters programs.</i>	Vacancy rate	<i>Vacancy divided by funded capacity</i>
Queue	<i>This number includes all people waiting to be admitted to a shelter or a service to be provided</i>	Current capacity	<i>The number represents active beds available. This will not include any beds made unavailable, e.g. bed bugs, maintenance, etc. This number will be less than or equal to funded capacity</i>
Occupancy (active admissions)	<i>This number represents currently occupied beds</i>	Funded capacity	<i>As per Operating Agreements</i>
Occupancy rate	<i>100% minus the Vacancy Rate</i>		

Occupancy by Age		This section can only be viewed by Head Office	
Under 18	<i>Each category lists all active admissions within one age group per report</i>	50 - 64	
18 - 25		65 and Over	
26 - 49			

Occupancy		This section can only be viewed by Head Office	
Male	<i>This section lists all active admissions for each gender</i>		
Female			
Transgender			

Occupancy by Sector		This section can only be viewed by Head Office	
Single Men	<i>This section records all active admissions in each sector</i>	Co-ed	
Single Women		Youth	
Family	<i>Only records # of families, not all family members</i>		

Bed Nights			
Yesterday	<i>Number of beds occupied as of 4:00 a.m. this morning represents the bed nights for yesterday</i>	Past 30 Days	<i>All occupied beds for the past 30 days up to yesterday (4:00 a.m. this morning)</i>
Current Month	<i>Includes the number of all occupied beds for the</i>	Previous Month	<i>All occupied beds in the previous calendar</i>

	<i>current month, up to 4:00 a.m. this morning</i>		<i>month</i>
--	--	--	--------------

Incidents	
New incidents past 30 days	<i>These numbers include all information entered by 4:00 a.m. this morning</i>
New incidents this calendar month	
Open incidents	<i>This number represents all incidents that have not been concluded or closed. All incidents should be completed and closed through internal review and sign off procedure.</i>

Service Restrictions							
<p><i>This report does not provide aggregate numbers. One restriction may be represented in more than one category. The duration will be recorded as the original duration applied at the time of recording the incidents. All incidents recorded up to 4:00 a.m. this morning will be included.</i></p> <p><i>You must notify and discuss all lengthy service restrictions with your Agency Review Officer at Hostel Services</i></p>							
Original duration of restriction (in days)	1-7	8-14	15-30	31-60	61-90	91-180	180+
New restrictions past 30 days							
New restrictions this calendar month							
Currently active							
Terminated early past 30 days							
Expired past 30 days							


Complaints (to Head Office only)	
New complaints past 30 days	<i>This section lists new complaints entered in the last 30 days. It will not include all active complaints</i>
New complaints this calendar month	<i>This section lists new complaints in the current calendar month</i>
Open complaints (<30 days old)	<i>This section lists any complaints that remain unsolved, but were originally opened less than 30 days ago</i>
Open complaints (<30 – 60 days old)	<i>This section lists any complaints that remain unsolved, and were originally opened between 30 and 60 days ago</i>
Open complaints (>60 days old)	<i>This section lists any complaints that remain unsolved, and were originally opened between more than 60 days ago</i>

Case Notes	
New Notes Past 30 Days	<i>This section lists all new case notes entered in the last 30 days. It will not include notes that were added to existing notes</i>
New Notes This Calendar Month	<i>This section lists all new case notes entered in the current month. It will not include notes that were added to existing notes</i>

Incomplete Notes (< 30 days old)	This section lists all notes, that have remained incomplete for 30 days or less, and therefore remain open
Incomplete Notes (30 – 60 Days Old)	This section lists all notes, that have remained incomplete for 30 – 60 days, and therefore remain open
Incomplete Notes (>60 Days Old)	This section lists all notes, that have remained incomplete for 60 days or more, and therefore remain open

Print Options: Browser Print

Report Sample Screen:



Shelter:
User: Lee, Ben

[Home](#) [My Tasks](#) [Reports](#) [Administration](#) [Help](#) [Logout](#)
[Client](#) [Program](#) [Facility](#) [Shelter](#) [Head Office](#)

Navigator
Head Office
General
Dashboard
Statistics
Occupancy
Occupancy - Unique Clients
Client Services
Client Services - Unique Clients
Discharges
Discharges - Unique Clients
Reports
Occupancy Summary Report
Point In Time
Occupancy Report

Head Office Dashboard

[Back to General](#)

Shelter:

Program: Program Type:

Occupancy

Active Intakes without Admission	122	Vacancy	2363
Referrals from Other Shelters	226	Vacancy Rate	68.93%
Queue	44	Current Capacity	4456
Occupancy(Active Admissions)	1075	Funded Capacity	3428
Occupancy Rate	31.07%		

Occupancy by Age

Under 18	50	50 - 64	278
18 - 25	225	65 and Over	52
26 - 49	470		

Occupancy by Gender

Male	684		
Female	380		
Transgender	11		

Occupancy by Sector

Single Men	418	Couples	73
Single Women	196	Youth	268
Family	120		

Bed Nights

Yesterday	1075	Past 30 Days	32253
Current Month	18275	Previous Month	32282

Incidents

New Incidents Past 30 Days	1		
New Incidents This Calendar Month	1		
Open Incidents	44		

Service Restrictions

Original Duration of Restriction (in Days)	1 - 7	8 - 14	15 - 30	31 - 60	61 - 90	91 - 180	>180
New Restrictions Past 30 Days	1	1	0	0	1	0	0
New Restrictions This Calendar Month	1	0	0	0	0	0	0
Currently Active	0	0	0	0	1	0	0
Terminated Early Past 30 Days	0	0	0	0	0	0	0
Expired Past 30 Days	1	3	0	0	2	0	0
Expired Next 30 Days	0	0	0	0	0	0	0

Complaints (to Head Office Only)

New Complaints Past 30 Days	0		
New Complaints This Calendar Month	0		
Open Complaints (<30 Days Old)	0		
Open Complaints (30 - 60 Days Old)	0		
Open Complaints (>60 Days Old)	0		

Case Notes

New Notes Past 30 Days	44		
New Notes This Calendar Month	44		
Incomplete Notes (<30 Days Old)	2		
Incomplete Notes (30 - 60 Days Old)	3		
Incomplete Notes (>60 Days Old)	1201		

60. Head Office Occupancy Screen

Report Category: Head office

Access Via: Head office Navigator

User Access Group: Supervisor & Manager roles

Description:

This System level based Occupancy screen shows statistics for new intakes, new admissions, discharges, accepted and rejected referrals to and from other Programs, any stays ≥ 1 day and total bed nights for all shelter programs. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Intake, Admission, Discharge, Referral and Stay is counted as 1 occurrence regardless of the number of family members present at the time of the action. The only exception is the Bed Nights row, for which each family member contributes to the count.

(Note that all Occupancy stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4.a.m. and update any occupancy changes timely into SMIS.)

All Stays are based upon the 4 a.m. threshold and are counted only if the client stays pass this time. However, Admissions stats does not require the client to stay pass the 4 a.m. threshold. For example, if a client is admitted at 11 p.m. and is discharged few hours later at 1 a.m., the new Intake, Admission and Discharge stats will increase its count by 1 respectively, but NOT the Stays count since the client did not stay passed the 4 a.m. threshold.

Report Parameters:

Shelter	filter results by a particular Shelter
Program	filter results by a particular Program in combination with the Shelter parameter above or by just this Program parameter criteria
Age	filter results by any 1 of the 5 distinct pre-determined standard age groups
Gender	filter by any 1 of the 3 genders
Sector	filter by any 1 of the standard 5 sectors

Note that results can be filtered by a combination of any of these 5 parameters.

Report Detail (Fields):

Intakes	number of new intakes within the column date range)
Admissions	(number of new admissions within the column date range)
Discharges	(number of discharges within the column date range)
Accepted Referrals From Other Programs	(number of accepted referrals from other Programs within the column date range)
Rejected Referrals From Other Programs	(number of rejected referrals from other Programs within the

	column date range)
Accepted Referrals To Other Programs	(number of accepted referrals to other Programs within the column date range)
Rejected Referrals To Other Programs	(number of rejected referrals to other Programs within the column date range)
Stays (>=1 day)	(number of client stays >= 1 day within the column date range, note that this would include clients who were already staying in the Program at the beginning of the date range)
Bed Nights	(number of total bed nights of all clients within the column date range)

Report Layout:

Statistics – Head Office

This report is accessed through the left side Navigator, once you have selected the "Head Office" icon. This report is accessible to managers and supervisors and provides real-time data that does not represent unique clients. This information includes aggregate data. Only Head Office has the ability to create this report

Shelter:	<i>The arrow on the right will list all shelters in the system. Leaving this section blank produces a system-wide report, including data from all shelters</i>	↓	Age	<i>The arrow on the right allows creation of a report based on age categories defined in the Occupancy Report and Dashboard</i>	↓
Program:	<i>The arrow on the right will list all bedded, service and shelter specific programs within the system. Leaving this blank will include data from all programs</i>	↓	Gender	<i>The arrow on the right allows creation of a report based on gender</i>	↓
			Sector	<i>The arrow on the right allows creation of a report based on sector</i>	↓
			search	reset	

This report lists data according to periods in the columns. Data for the current day is not available for this report

Occupancy										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>Not unique clients = same client could have multiple entries, families are counted as one family head</i>
Intakes										<i>Includes all new intakes</i>

										<i>completed regardless of admission – represents "requests for service"</i>
Admissions										<i>Includes all new admissions to shelters,</i>
Discharges										<i>Includes number of all completed discharges</i>
Accepted Referrals from Other Shelters										<i>Includes all referrals made to and accepted by other shelters. Includes referrals from CI and SHARC</i>
Rejected Referrals from Other Shelters										<i>Includes all referrals from other shelters (including CI or SHARC) that were not admitted</i>
Accepted Referrals to Other Shelters										<i>Includes all referrals to other shelters that were admitted</i>
Rejected Referrals to Other Shelters										<i>Includes all referrals to other shelters that were not</i>


										<i>admitted</i>
Stay (≥ 1 Day)										<i>Includes the number of people or family heads that stayed in a shelter for one day or more in the identified period</i>
Bednights										<i>Includes the total of all occupied beds in the given period</i>

Statistics – Head Office

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



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User: Lee, Ben

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Statistics - Head Office

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Shelter:
Age:

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Gender:

Sector:

Occupancy

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Intakes	0	1	119	4	1	196	43	72	251
Admissions	0	1	8	1	1	81	28	50	104
Discharges	0	1	6	4	1	83	26	45	123
Accepted Referrals From Other Shelters	0	0	0	0	0	1	13	13	1
Rejected Referrals From Other Shelters	0	0	1	0	0	3	2	2	3
Accepted Referrals To Other Shelters	0	0	0	0	0	1	13	13	1
Rejected Referrals To Other Shelters	0	0	1	0	0	3	2	2	3
Stays (>= 1day)	1011	1012	1013	1015	1012	1016	1033	1046	1052
Bed Nights	1075	19350	33244	32282	19350	98457	98717	313071	392046

61. Head Office Occupancy – Unique Clients Screen

Report Category: Head Office

Access Via: Head Office Navigator

User Access Group: Supervisor & Manager roles at Head Office only

Description:

This System level based Occupancy screen shows statistics for total number of unique clients with new intakes, new admissions, discharges, accepted and rejected referrals to and from other Shelters, any stays ≥ 1 day and total bed nights for any or selected (filtered) Shelter or Program for the various date ranges. For example, if a client has 2 "new" intakes during the column period, then it is counted as 1 unique client intake only. These stats can also be exported to Microsoft Excel format. Note also that for families, every member of the family is counted as a unique individual and therefore contributes to the total count(s).

On this Screen, for a *family*, each Intake, Admission, Discharge, Referral and Stay, each unique family member is counted individually when present at the time of the action. However, if a family member is part of two different family intakes, admission or other actions during 1 single reporting date range, then he/she is counted as 1 unique individual on this screen.

(Note that all Occupancy stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning. This allows for all shelter programs to do their mandatory two bed checks before 4.a.m. and update any occupancy changes timely into SMIS.)

All Stays are based upon the 4 a.m. threshold and are counted only if the client stays pass this time. However, Admissions stats does not require the client to stay pass the 4 a.m. threshold. For example, if a client is admitted at 11 p.m. and is discharged few hours later at 1 a.m., the new Intake, Admission and Discharge stats will increase its count by 1 respectively, but NOT the Stays count since the client did not stay passed the 4 a.m. threshold.

Report Parameters:

Shelter	filter results by a particular Shelter
Program	results by a particular Program in combination with the Shelter parameter above or filter by just this Program parameter criteria
Age	filter results by any 1 of the 5 distinct pre-determined standard age groups
Gender	filter by any 1 of the 3 genders
Sector	filter by any 1 of the standard 5 sectors

Note that results can be filtered by a combination of any of these 5 parameters.

Report Detail (Fields):

Intakes	number of unique clients with new intakes within the column date range)
---------	---

Admissions	(number of unique clients with new admissions within the column date range)
Discharges	(number of unique clients with discharges within the column date range)
Accepted Referrals From Other Programs	(number of unique clients with accepted referrals from other Programs within the column date range)
Rejected Referrals From Other Programs	(number of unique clients with rejected referrals from other Programs within the column date range)
Accepted Referrals To Other Programs	(number of unique clients with accepted referrals to other Programs within the column date range)
Rejected Referrals To Other Programs	(number of unique clients with rejected referrals to other Programs within the column date range)
Stays (>=1 day)	(number of unique client stays >= 1 day within the column date range, note that this would include unique clients who were already staying in the Shelter Program at the beginning of the date range)

Report Layout:

Statistics – Head Office

This report is accessed through the left side Navigator, once you have selected the "Head Office" icon. This report is accessible to managers and supervisors and provides real-time data that represent unique clients. This information includes aggregate data. Only Head Office has the ability to view this screen.

Shelter:	<i>The arrow on the right will list all shelters in the system. Leaving this section blank produces a system-wide report, including data from all shelters</i>	↓	Age	<i>The arrow on the right allows creation of a report based on age categories defined in the Occupancy Report and Dashboard</i>	↓
Program:	<i>The arrow on the right will list all bedded, service and shelter specific programs within the system. Leaving this blank will include data from all programs</i>	↓	Gender	<i>The arrow on the right allows creation of a report based on gender</i>	↓
			Sector	<i>The arrow on the right allows creation of a report based on sector</i>	↓
			search	reset	
This report lists data according to periods in the columns. Data for the current day is not available for this report					

Occupancy										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Unique clients = clients with 1 or

										multiple entries are counted as 1 only, families members are all counted as unique individuals as well
Intakes										Includes all new intakes completed regardless of admission – represents "requests for service"
Admissions										Includes all new admissions to shelters, but will not include multiple admissions of one client in one day
Discharges										Includes number of all completed discharges
Accepted Referrals from Other Shelters										Includes all referrals made to and accepted from other shelters. Includes referrals from CI and SHARC
Rejected Referrals										Includes all referrals


from Other Shelters										from other shelters (including CI or SHARC) that were not admitted
Accepted Referrals to Other Shelters										Includes all referrals to other shelters that were admitted
Rejected Referrals to Other Shelters										Includes all referrals to other shelters that were not admitted
Stay (≥ 1 Day)										Includes the unique number of people and all family members that stayed in a shelter for one day or more in the identified period
Bednights										Includes the total number of occupied beds in the given period

Statistics – Head Office

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



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User: Lee, Ben

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Occupancy - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Intakes	0	2	9	5	2	25	38	61	71
Admissions	0	2	7	2	2	21	27	47	42
Discharges	0	2	6	4	2	25	24	46	62
Accepted Referrals From Other Shelters	0	0	0	0	0	1	13	13	1
Rejected Referrals From Other Shelters	0	0	1	0	0	3	2	2	3
Accepted Referrals To Other Shelters	0	0	0	0	0	1	13	13	1
Rejected Referrals To Other Shelters	0	0	1	0	0	3	2	2	3
Stays (>= 1day)	1075	1077	1078	1077	1077	1081	1080	1093	1097

62. Head Office Client Services Screen

Report Category: Head Office

Access Via: Head Office Navigator

User Access Group: Supervisor & Manager roles at Head Office only

Description:

This System level based Client Services screen shows counts of new incidents, new service restrictions, new complaints and new case notes for the System or selected criteria or filter(s) for various time frames. These stats can also be exported to Microsoft Excel format.

(Note that all Client Services stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

For example, if a new Case Note is written for a Client at 3 p.m. yesterday and another new Note written at 2 a.m. early today, they are both counted as for yesterday's business day.

Report Parameters:

Shelter	filter results by a particular Shelter
Program	filter results by a particular Program in combination with the Shelter parameter above or by just this Program parameter criteria
Program Type	filter by <i>Bed</i> programs or <i>Service</i> programs
Age	filter results by any 1 of the 5 distinct pre-determined standard age groups
Gender	filter by any 1 of the 3 genders
Sector	filter by any 1 of the standard 5 sectors

Note that results can be filtered by a combination of any of these 6 parameters. Default is no filters.

Report Detail (Fields):

New Incidents	(total number of new incidents recorded during the column date period)
New Service Restrictions	(total number of new service restrictions created during the column date period)
New Complaints	total number of new complaints records during the column date period)
New Case Notes	(total number of new case notes created during the column date period)

Screen Layout:

Client Services – Head Office

This report is accessed through the left side Navigator, once you have selected the "Head Office" icon. This report is accessible to managers and supervisors and provides real-time data that does not represent unique clients. This information includes aggregate data

Only Head Office has the ability to view this screen.

Shelter:	<i>The arrow on the right will list all shelters in the system. Leaving this section blank produces a system-wide report, including data from all shelters</i>	↓	Age	<i>The arrow on the right allows creation of a report based on age categories defined in the Occupancy Report and Dashboard</i>	↓
Program:	<i>The arrow on the right will list all bedded, service and shelter specific programs within the system. Leaving this blank will include data from all programs</i>	↓	Gender	<i>The arrow on the right allows creation of a report based on gender</i>	↓
			Sector	<i>The arrow on the right allows creation of a report based on sector</i>	↓
			search	reset	

This report lists data according to periods in the columns. Data for the current day is not available for this report

Client Services											
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Not unique clients = same client could have multiple entries, families are counted as one family head	
New Incidents										Includes all new incidents that occurred in the identified period. It does not include open incidents initiated in a previous period	
New Service Restrictions										Includes all new service restrictions entered in the	


										<i>identified period. It does not include all restrictions "active" in that period as some may have been initiated in a previous period.</i>
New Complaints										<i>Includes all new complaints initiated by head office ONLY in the identified period. It does not include all open complaints in this period.</i>
New Case Notes										<i>Includes all new case notes entered in the identified period. It does not include all open notes, or new notes added to existing notes.</i>

Client Services – Head Office

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



Shelter:
User: Lee, Ben

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Program Type
Age
Gender
Sector

Client Services

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Incidents	0	0	3	1	0	3	3	14	10
New Service Restrictions	0	1	10	7	1	10	23	43	12
New Complaints	0	0	5	3	0	7	4	9	8
New Case Notes	0	44	3	0	44	22	10	70	58

63. Head Office Client Services – Unique Clients Screen

Report Category: Head Office

Access Via: Head Office Navigator

User Access Group: Supervisor & Manager roles

Description:

This System level based Client Services screen shows total number of unique clients involved in new incidents, new service restrictions, new complaints and new case notes for the System or selected criteria or filter(s) for various time frames. These stats can also be exported to Microsoft Excel format.

(Note that all Client Services stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

For example, if a new Case Note is written for a Client at 3 p.m. yesterday and another new Note written for a different Client at 2 a.m. early today, they are both counted as for yesterday's business day. However, if the 2nd Note was written for the same Client, then yesterday's count will only increase by 1 as this screen shows Unique Client counts during a date period.

Report Parameters:

Shelter	filter results by a particular Shelter
Program	filter results by a particular Program in combination with the Shelter parameter above or by just this Program parameter criteria
Program Type	filter by <i>Bed</i> programs or <i>Service</i> programs
Age	filter results by any 1 of the 5 distinct pre-determined standard age groups
Gender	filter by any 1 of the 3 genders
Sector	filter by any 1 of the standard 5 sectors

Note that results can be filtered by a combination of any of these 6 parameters. Default is no filters.

Report Detail (Fields):

New Incidents	(total number of unique clients involved in new incidents during the column date period)
New Service Restrictions	(total number of unique clients given new service restrictions created during the column date period)
New Complaints	(total number of unique clients relating to new complaints records during the column date period)
New Case Notes	(total number of unique clients for which new case notes were created during the column date period)

Screen Layout:

Client Services – Head Office

This screen is accessed through the left side Navigator, once you have selected the "Head Office" icon. This screen is accessible to managers and supervisors and provides real-time data that does not represent unique clients. This information includes aggregate data. Only Head Office has the ability to view this screen.

Shelter:	<i>The arrow on the right will list all shelters in the system. Leaving this section blank produces a system-wide report, including data from all shelters</i>	↓	Age	<i>The arrow on the right allows creation of a report based on age categories defined in the Occupancy Report and Dashboard</i>	↓
Program:	<i>The arrow on the right will list all bedded, service and shelter specific programs within the system. Leaving this blank will include data from all programs</i>	↓	Gender	<i>The arrow on the right allows creation of a report based on gender</i>	↓
			Sector	<i>The arrow on the right allows creation of a report based on sector</i>	↓
			search	reset	
This report lists data according to periods in the columns. Data for the current day is not available for this report					

Client Services										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Unique clients = same client could have multiple entries, all families members are counted
New Incidents										Includes all new incidents occurred in the identified period. It does not include open incidents initiated in a previous period


New Service Restrictions										Includes all new service restrictions entered in the identified period. It does not include all restrictions "active" in that period as some may have been initiated in a previous period.
New Complaints										Includes all new complaints initiated by head office ONLY in the identified period. It does not include all open complaints in this period.
New Case Notes										Includes all new case notes entered in the identified period. It does not include all open notes, or new notes added to existing notes.

Client Services – Head Office

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



Shelter: Client
 User: Lee, Ben

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Client Services - Head Office

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Shelter
 Program
 Program Type

Age
 Gender
 Sector

search reset

Client Services - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Incidents	0	0	0	1	0	0	3	9	2
New Service Restrictions	0	1	8	7	1	8	16	27	10
New Complaints	0	0	4	3	0	6	4	8	7
New Case Notes	0	1	1	0	1	3	6	12	18

64. Head Office Discharge Screen

Report Category: Head Office

Access Via: Head Office Navigator

User Access Group: Supervisor & Manager roles

Description:

This System level based Discharge screen shows counts of various discharge dispositions for the System or selected criteria or filter(s) for various time frames. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Discharge, it is counted as 1 occurrence regardless of the number of family members present at the time of the discharge. However, if a single client or family is discharged more than once during any column date period, each discharge occurrence is counted regardless if it's the same or different disposition or reason.

For example, if a single client was discharge on the 2nd day of the month, and re-admitted and discharged in the middle of the same month and for the same discharge disposition but different discharge reasons, then he/she is counted twice for that month's discharge disposition count, and counted once for each of the two different monthly count of discharge reasons.

(Note that all Discharge stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

Report Parameters:

Shelter	filter results by a particular Shelter
Program	filter results by a particular Program in combination with the Shelter parameter above or by just this Program parameter criteria
Age	filter results by any 1 of the 5 distinct pre-determined standard age groups
Gender	filter by any 1 of the 3 genders
Sector	filter by any 1 of the standard 5 sectors

Note that results can be filtered by a combination of any of these 5 parameters. Default is no filters.

Report Detail (Fields):

Custody	(total number of client (single or family) discharges to custody within the column date period)
Detox	(total number of client discharges to detox within the column date period)
Escorted off premises	(total number of clients escorted off premises upon discharge within the column date period)
Hospital	(total number of client discharges to hospital within the column date period)
Housing	(total number of client discharges to housing within the column date period)
Other	(total number of client discharges to other dispositions within the column date period)

Other Hostels	(total number of client discharges to other hostels within the column date period)
Unknown	(total number of client discharges to unknown dispositions within the column date period)

And ALL Discharge Reason fields listed.

Screen Layout:

Statistics – Head Office

This report is accessed through the left side Navigator, once you have selected the "Head Office" icon. This report is accessible to managers and supervisors and provides real-time data that does not represent unique clients. This information includes aggregate data. Only Head Office has the ability to view this screen.

Shelter:	<i>The arrow on the right will list all shelters in the system. Leaving this section blank produces a system-wide report, including data from all shelters</i>	↓	Age	<i>The arrow on the right allows creation of a report based on age categories defined in the Occupancy Report and Dashboard</i>	↓
Program:	<i>The arrow on the right will list all bedded, service and shelter specific programs within the system. Leaving this blank will include data from all programs</i>	↓	Gender	<i>The arrow on the right allows creation of a report based on gender</i>	↓
			Sector	<i>The arrow on the right allows creation of a report based on sector</i>	↓
			search	reset	
This report lists data according to periods in the columns. Data for the current day is not available for this report					

Discharge Dispositions										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>Not unique clients = same client could have multiple entries, families are counted as one family head</i>
Custody										<i>Includes all discharges to custody entered in</i>

										<i>the identified period regardless of the individual – i.e. one person may be discharged more than once to "custody"</i>
Detox										<i>Includes all discharges to custody regardless of the individual.</i>
Escorted off premises										<i>Includes all discharges escorted off premises regardless of the individual.</i>
Hospital										<i>Includes all discharges to the hospital regardless of the individual.</i>
Housing										<i>Includes all discharges to housing regardless of the individual.</i>
Other										<i>Includes all discharges for unidentified dispositions regardless of the individual.</i>
Other Hostel										<i>Includes all discharges to another</i>

										<i>shelter regardless of the individual. This would include all automatic discharges as a result of the individual being admitted to another shelter</i>
Unknown										<i>Includes all discharges to unknown disposition (usually a fail-to-return) regardless of the individual.</i>

This section includes aggregate data for each discharge reason, and may include the same individual discharged various times for the same or different reasons. This list represents each individual discharge according to discharge reason that is entered into SMIS.

The last three underlined reasons are new.

Discharge Reasons										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	<i>Not unique clients = same client could have multiple entries, families are counted as one family head</i>
New Address – Private Housing										
New Address – Transitional Housing										
New Address – Subsidized Housing										


Returned to Previous Address										
Reunited with family/ friends										
Detox										
Residential Treatment Program										
Long-Term Care Facility										
Left the City										
Hospitalized										
Incarcerated										
Decided to leave										
Failed to return										
Not following case plan										
Not participating in case planning										
Repeated rule violations										
Disruptive rule violations										
Disruptive behaviour										
Violent or threatening behaviour										
Health & Safety of residents, volunteers or staff										
Assault of residents, volunteers or staff										
Wielding weapons or dangerous objects										

Possession of firearms										
Possession of illegal substances/ contraband										
Trafficking in illegal drugs										
Other										
<u>Automatic discharge – client admitted to another program</u>										
<u>Daily discharge</u>										This reason unique to only a few shelters that are closed during certain hours and require all individuals to leave the shelter at that time.
<u>Death</u>										

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



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User: Lee, Ben

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Occupancy Summary Report
Point In Time Occupancy Report

Statistics - Head Office

[Back to General](#)
[Export to Excel](#)

Shelter:
Age:

Program:
Gender:

Sector:

[Search](#)
[Reset](#)

Discharge Dispositions

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Custody	0	0	3	0	0	10	1	7	26
Detox	0	0	3	2	0	17	3	7	26
Escorted off premises	0	0	0	0	0	16	1	3	21
Hospital	0	2	0	0	2	8	1	3	10
Housing	0	0	2	0	0	14	0	3	20
Other	0	0	4	1	0	9	4	5	13
Other Hostel	0	0	4	1	0	4	16	22	9
Unknown	0	0	7	0	0	12	0	0	13

Discharge Reasons

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Address - Private Housing	0	0	7	0	0	11	1	6	26
New Address - Transitional Housing	0	0	3	1	0	12	1	4	25
New Address - Subsidized Housing	0	0	0	0	0	4	1	1	8
Returned To Previous Address	0	0	0	0	0	4	0	0	6

Returned To Previous Address	0	0	0	0	0	4	0	0	6
Reunited with family/friends	0	0	0	0	0	3	0	1	6
Detox	0	0	1	0	0	4	0	1	5
Residential treatment program	0	0	0	0	0	1	0	0	1
Long-term care facilities	0	0	0	0	0	0	1	1	1
Left The City	0	0	1	0	0	4	0	1	5
Hospitalized	0	0	0	0	0	0	1	1	1
Incarcerated	0	0	0	0	0	3	0	0	3
Decided to leave	0	0	0	0	0	4	1	1	5
Failed to return	0	0	0	0	0	0	0	0	0
Not following case plan	0	0	0	0	0	2	0	0	2
Not participating in case planning	0	0	0	0	0	2	0	0	2
Repeated rule violations	0	0	0	0	0	0	0	0	0
Disruptive behaviour	0	0	1	0	0	4	0	3	4
Violent or threatening behaviour	0	0	0	0	0	0	1	1	0
Health & Safety of residents, volunteers or staff	0	0	0	0	0	3	0	0	3
Assault of residents, volunteers or staff	0	0	0	1	0	1	1	2	1
Wielding weapons or dangerous objects	0	2	0	0	2	1	0	2	1
Possession of firearms	0	0	0	0	0	2	0	0	2
Possession of illegal substances/contraband	0	0	0	0	0	1	0	0	1
Trafficking in illegal drugs	0	0	0	0	0	3	0	0	3
Other	0	0	7	0	0	13	3	3	14
Automatic discharge - Client admitted to another program	0	0	2	2	0	2	15	22	7
Daily Discharge	0	0	1	0	0	6	0	0	6
Death	0	0	0	0	0	0	0	0	0

65. Head Office Discharge – Unique Clients Screen

Report Category: Head Office

Access Via: Head Office Navigator

User Access Group: Supervisor & Manager roles

Description:

This System level based Discharge screen shows counts unique clients for various discharge dispositions for the System or selected criteria or filter(s) during the various time frames. For example, if a client is discharge twice from two admissions during a column date period, then it is counted as 1 unique client discharge. These stats can also be exported to Microsoft Excel format.

On this Screen, for a *family* Discharge, each unique family member is counted individually when present at the time of the action. However, if a family member is part of two different family discharges during the same reporting date period (i.e. column cell), then he/she is counted as only 1 unique individual on this screen. Also, if a single client is discharged more than once during any column date period, the count only increments by 1.

For example, if a single client was discharge on the 2nd day of the month, and re-admitted and discharged in the middle of the same month and for the same discharge disposition but different discharge reasons, then he/she is counted only once for that month's discharge disposition count, but is counted once for each of the two different monthly count of discharge reasons.

(Note that all Discharge stats on this screen are based upon the 4 a.m. threshold each day, meaning a business day is considered to start at 4 a.m. of the day till 4 a.m. early next morning.)

Report Parameters:

Shelter	filter results by a particular Shelter
Program	filter results by a particular Program in combination with the Shelter parameter above or by just this Program parameter criteria
Age	filter results by any 1 of the 5 distinct pre-determined standard age groups
Gender	filter by any 1 of the 3 genders
Sector	filter by any 1 of the standard 5 sectors

Note that results can be filtered by a combination of any of these 5 parameters. Default is no filters.

Report Detail (Fields):

Custody	(total number of unique client discharges to custody within the column date period)
Detox	(total number of unique client discharges to detox within the column date period)
Escorted off premises	(total number of unique clients escorted off premises upon discharge within the column date period)

Hospital	(total number of unique client discharges to hospital within the column date period)
Housing	(total number of unique client discharges to housing within the column date period)
Other	(total number of unique client discharges to other dispositions within the column date period)
Other Hostels	(total number of unique client discharges to other hostels within the column date period)
Unknown	(total number of unique client discharges to unknown dispositions within the column date period)

And ALL Discharge Reason fields listed.

Path to the Report: Head office, General Icon in the Navigator option

Statistics – Head Office

This report is accessed through the left side Navigator, once you have selected the "Head Office" icon. This report is accessible to managers and supervisors and provides real-time data that represent unique clients. This information includes aggregate data
Only Head Office has the ability to view this screen.

Shelter:	<i>The arrow on the right will list all shelters in the system. Leaving this section blank produces a system-wide report, including data from all shelters</i>	↓	Age	<i>The arrow on the right allows creation of a report based on age categories defined in the Occupancy Report and Dashboard</i>	↓
Program:	<i>The arrow on the right will list all bedded, service and shelter specific programs within the system. Leaving this blank will include data from all programs</i>	↓	Gender	<i>The arrow on the right allows creation of a report based on gender</i>	↓
			Sector	<i>The arrow on the right allows creation of a report based on sector</i>	↓
			search	reset	

This report lists data according to periods in the columns. Data for the current day is not available for this report

Discharge Dispositions										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Unique clients = same client is counted only once, families members are counted

										as individuals also
Custody										Includes all discharges to custody entered in the identified period regardless of the individual – i.e. one person may be discharged more than once to "custody"
Detox										Includes all unique client discharges to Detox.
Escorted off premises										Includes all unique client discharges escorted off premises.
Hospital										Includes all unique client discharges to the hospital
Housing										Includes all unique client discharges to housing.
Other										Includes all unique client discharges for unidentified dispositions

Other Hostel										Includes all unique client discharges to another shelter. This would include all automatic discharges as a result of the individual being admitted to another shelter
Unknown										Includes all unique client discharges to unknown disposition (usually a fail-to-return).

This section includes aggregate data for each discharge reason, and may include the same individual discharged various times for the same or different reasons. This list represents each individual discharge according to discharge reason that is entered into SMIS.
The last three underlined reasons are new.

Discharge Reasons										
	Yester day	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr	Unique clients = same client is counted only once, families members are counted as individuals also
New Address – Private Housing										
New Address – Transitional										


Housing										
New Address – Subsidized Housing										
Returned to Previous Address										
Reunited with family/ friends										
Detox										
Residential Treatment Program										
Long-Term Care Facility										
Left the City										
Hospitalized										
Incarcerated										
Decided to leave										
Failed to return										
Not following case plan										
Not participating in case planning										
Repeated rule violations										
Disruptive rule violations										
Disruptive behaviour										
Violent or threatening behaviour										
Health & Safety of residents, volunteers or staff										
Assault of residents, volunteers or staff										

Wielding weapons or dangerous objects										
Possession of firearms										
Possession of illegal substances/contraband										
Trafficking in illegal drugs										
Other										
<u>Automatic discharge – client admitted to another program</u>										
<u>Daily discharge</u>										This reason unique to only a few shelters that are closed during certain hours and require all unique individuals to leave the shelter at that time.
<u>Death</u>										

Print Options: Browser Print

Export Options: MS Excel

Report Sample Screen:



Shelter: _____

User: Lee, Ben

Home

My Tasks

Reports

Administration

Help

Logout

Client

Program

Facility

Shelter

Head Office

Navigator

- Head Office
- General
- Dashboard
- Statistics
 - Occupancy
 - Occupancy - Unique Clients
 - Client Services
 - Client Services - Unique Clients
 - Discharges
 - Discharges - Unique Clients**
- Reports
 - Occupancy Summary Report
 - Point In Time Occupancy Report

Statistics - Head Office

Back to General
Export to Excel

Shelter

Program

Age

Gender

Sector

Search

Reset

Discharge Dispositions - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Custody	0	0	3	0	0	6	1	7	21
Detox	0	0	3	2	0	7	3	7	15
Escorted off premises	0	0	0	0	0	4	1	3	9
Hospital	0	2	0	0	2	3	1	3	5
Housing	0	0	2	0	0	6	0	3	11
Other	0	0	4	1	0	8	3	3	12
Other Hostel	0	0	4	1	0	4	16	21	9
Unknown	0	0	6	0	0	9	0	0	10

Discharge Reasons - Unique Clients

	Yesterday	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
New Address - Private Housing	0	0	6	0	0	7	1	6	22
New Address - Transitional Housing	0	0	3	1	0	6	1	4	18
New Address - Subsidized Housing	0	0	0	0	0	2	1	1	6
Returned To Previous Address	0	0	0	0	0	2	0	0	4

Reunited with family/friends	0	0	0	0	0	2	0	1	5
Detox	0	0	1	0	0	3	0	1	4
Residential treatment program	0	0	0	0	0	1	0	0	1
Long-term care facilities	0	0	0	0	0	0	1	1	1
Left The City	0	0	1	0	0	2	0	1	3
Hospitalized	0	0	0	0	0	0	1	1	1
Incarcerated	0	0	0	0	0	1	0	0	1
Decided to leave	0	0	0	0	0	3	1	1	4
Failed to return	0	0	0	0	0	0	0	0	0
Not following case plan	0	0	0	0	0	2	0	0	2
Not participating in case planning	0	0	0	0	0	1	0	0	1
Repeated rule violations	0	0	0	0	0	0	0	0	0
Disruptive behaviour	0	0	1	0	0	4	0	3	4
Violent or threatening behaviour	0	0	0	0	0	0	1	1	0
Health & Safety of residents, volunteers or staff	0	0	0	0	0	3	0	0	3
Assault of residents, volunteers or staff	0	0	0	1	0	1	1	2	1
Wielding weapons or dangerous objects	0	2	0	0	2	1	0	2	1
Possession of firearms	0	0	0	0	0	2	0	0	2
Possession of illegal substances/contraband	0	0	0	0	0	1	0	0	1
Trafficking in illegal drugs	0	0	0	0	0	2	0	0	2
Other	0	0	7	0	0	10	2	2	10
Automatic discharge - Client admitted to another program	0	0	2	2	0	2	15	20	7
Daily Discharge	0	0	1	0	0	2	0	0	2
Death	0	0	0	0	0	0	0	0	0

66. Head Office Occupancy Summary Report

Report Category: Head Office

Access Via: Head Office Navigator

User Access Group: Supervisor & Manager roles

Description:

This System level based Occupancy Summary Report shows actual and approved Occupancy, Capacity and Vacancy counts at 4:00 am for any day in the past. The results are separated by Bedded-Program Types (Regular, Extreme Weather & Special Circumstance), and then further divided by Sectors. The Report can be printed or exported to PDF format.

Report Parameters:

As of Date	the reporting business date (based upon 4am of the next calendar date)
------------	--

Report Detail (Columns):

CURRENT Occupancy (A)	Occupancy as of the Report Parameter Date @ 4am
CURRENT Capacity (B)	Space Capacity as of the Report Parameter Date @ 4am
CURRENT Vacancy (B-A)	Space Capacity minus the current Occupancy
CURRENT % Occ.	Current Occupancy divided by current Space Capacity times 100
APPROVED Capacity (C)	Funding Capacity as of the Report Parameter Date @ 4am
APPROVED Vacancy (C-A)	Funding Capacity minus the current Occupancy
APPROVED % Occ.	Current Occupancy divided by approved (funding) Capacity times 100

Report Layout:

Occupancy Summary Report

Only Head Office has the ability to create this report, which includes real-time data for the specified date. The most recent data this report can include is the day before the report is run. The current day will not be available until 4:00 the following morning.

Reporting Period	Lists the date identified below			
Date	Calendar icon appears by clicking the arrow on the right	↓	Search	This report can only be exported to: PDF


CURRENT			APPROVED/FUNDED	
This column represents occupancy and vacancy of total space capacity beds.			this column represented the number of beds as specified In the Operating Agreements	
(A)	(B)	(B-A)	(C)	(C-A)

	Occupancy	Capacity	Vacancy	% Occ	Capacity	Vacancy	% Occ
Regular Beds							
Co-ed							
Families*							
Men							
Women							
Youth							
Total:							
*Family shelter bed numbers cannot accurately be represented in SMIS because of the need to inflate the capacities in order to accommodate different family configurations. Families are admitted to rooms, not specific beds. For example, each room will have identified approved occupancy as the maximum number of people that can fit in that room, even though the room will often hold fewer occupants. Each room must list the maximum occupancy in order to allow shelters to accommodate the needs of specific families. In addition, the number of motel rooms varies according to need.							
Extreme Weather/Emergency Beds							
Co-ed							
Families*							
Men							
Women							
Total:							
Youth							
These beds are listed within a separate program from "Regular Beds" and will only be paid a per diem when an extreme weather alert is called.							
Special Circumstance Beds							
Co-ed							
Men							
Women							
Grand Total:							
Special Circumstance Beds							
Youth							
Total:							
These beds are listed within a separate program "Regular Beds" and will only be paid a per diem when the admission is approved by SHARC							

Print Options: Report Print action button

Export Options: [PDF](#)

Report Sample Screen:


Occupancy Summary Report

Print
Close

Printed: 2012-10-19 15:56:48

Reporting Period: Oct 10, 2012

Date: 2012/10/10

	CURRENT				APPROVED		
	(A) Occupancy	(B) Capacity	(B-A) Vacancy	% Occ.	(C) Capacity	(C-A) Vacancy	% Occ.
Regular Beds							
Co-ed	72	179	107	40%	182	110	40%
Families	120	120	0	100%	120	0	100%
Men	304	794	490	38%	771	467	39%
Women	159	234	75	68%	230	71	69%
Youth	241	294	53	82%	293	52	82%
Total:	896	1,621	725	55%	1,596	700	56%
Extreme Weather/Emergency Beds							
Co-ed	1	10	9	10%	10	9	10%
Families	0	0	0	0%	0	0	0%
Men	58	80	22	73%	76	18	76%
Women	37	50	13	74%	44	7	84%
Total:	97	144	47	67%	170	73	57%
Youth	1	4	3	25%	40	39	3%
Special Circumstance Beds							
Co-ed	0			%			%
Men	56	66	10	85%	63	7	89%
Women	0	20	20	0%	20	20	0%
Grand Total:	1,075	1,887	812	57%	1,884	809	57%
Special Circumstance Beds							
Youth	26	36	10	72%	35	9	74%
Total:	82	122	40	67%	118	36	69%

67. Head Office Point In Time Occupancy Report

Report Category: Head Office

Access Via: Head Office Navigator

User Access Group: Supervisor & Manager roles

Description:

This is a Point-in-time Occupancy Summary Report shows Queue, Occupancy, Vacancy, Actual and Funding Capacity for all Bed Programs in the System on any particular Hour in the past. The Report can be printed or exported to Excel and PDF formats.

Report Parameters:

Reporting Datetime	(Reporting <i>Date</i> and the <i>Hour</i> of the reporting time)
--------------------	---

Report Detail (Fields):

Program	Name of Program
Queue	<i>This number represents the actual number of individuals in the queue for this Program at the specified time and date. Note that one individual may be in the queue for more than one program.</i>
Occupancy	<i>This number represents the actual occupied beds for each program at the specified time and date</i>
Vacancy	<i>This number represents the actual vacant beds for each program at the specified time and date. Authorized Leaves With Permission will not constitute vacant beds</i>
Actual Capacity	<i>This number represents the actual capacity for each program according to what has been entered into SMIS at the specified time and date. This number will not include beds taken off line due to bed bugs, etc.</i>
Funding Capacity	<i>This number represents the funded capacity for each program according to the Operating Agreement as of the specified time and date. This number should be equal to or greater than the Actual Capacity</i>

Report Layout:

Point In Time Occupancy Report

Only Head Office has the ability to create this report, which includes real-time data for the specified date and time. The time can only be entered by the hour and will register the data according to that time, rather than the 4:00 occupancy data.

Reporting Period	<i>Lists the date and time identified below</i>					
Reporting Datetime	<i>Calendar icon appears by clicking the arrow on the right</i>	↓	↓	the hour icon appears by clicking on the arrow on the left	• am ○ pm	Search

<u>Program</u>	<u>Queue</u>	<u>Occupancy</u>	<u>Vacancy</u>	<u>Actual Capacity</u>	<u>Funding Capacity</u>

Print Options: Report Print action button

Export Options: [Excel](#) , [PDF](#)

Report Sample Screen:

Point In Time Occupancy Report - Windows Internet Explorer

toronto SMIS

Point In Time Occupancy Report

Print Close

Printed: 2012/10/19

Reporting Period: 2012/10/16 2 am

Reporting Datetime

2012/10/16

2

am

pm

Search

[Excel](#)
[PDF](#)

Program	Queue	Occupancy	Vacancy	Actual Capacity	Funding Capacity
Seaton House - Long Term Program	0	0	134	134	135
Seaton House - O'Neill House	0	0	45	45	45
Second Base Bedded Program	0	0	58	58	0
Sojourn House Bedded Program	0	0	52	52	50
St. Simon's Shelter	0	0	57	57	57
St. Vincent De Paul - Amelie House - Women's Shelter	0	0	20	20	20
St. Vincent De Paul - Elisa House	0	0	40	40	40
St. Vincent De Paul - Mary's Home - Emergency Shelter	2	37	7	44	38
St. Vincent De Paul - Mary's Home - Extreme Weather Beds	0	0	6	6	6
St. Vincent De Paul - St. Clare's Residence - Transitional Housing	0	0	29	29	30
Street Haven - 109 Pembroke St - Supportive Housing	0	0	12	12	12
Street Haven - 607 St Clair West - Supportive housing	0	0	15	15	15
Street Haven - Emergency Hostel	0	0	31	31	0
Street Haven - Grant House	0	0	10	10	10
Street Haven - Jourbert House	0	0	6	6	0
TCH (program)	0	0	20	20	24
Touchstone Youth Centre - Residential Program	0	0	33	33	32
Turning Point Youth Services Shelter	0	0	35	35	35
University Settlement - Out of the Cold	0	0	75	75	75
Womens' Residence - Bellwoods House	0	10	0	10	10
Womens' Residence - Main Program	0	91	12	103	120
YMCA House	1	26	19	45	45
YWCA - Adult Women Shelter	0	0	8	8	0
YWCA - Youth Shelter	0	0	16	16	0
YWCA, Beatrice House, Transitional Housing	0	0	80	80	0
Youth without Shelter Emergency Shelter Program	0	0	30	30	30
Youth without Shelter Stay In School Program	0	0	21	21	20
v2.2 test program	0	0	3	3	20

78 items found, displaying 51 to 78. [\[First/Prev\]](#) 1, 2 [\[Next/Last\]](#)

REVISION HISTORY

Version	Description	Page	Date
1.1	Modifications to original draft in table formatting	various	September 5, 2013
1.2	Reformat Report Layout tables and grammar checks	various	March 19, 2014
1.3	Reformat Report Parameters to tables	various	April 8, 2014