torontoSMIS
Shelter Management Information System

# Case Management – Quick Reference

### Understanding The Case Management Function
The Case Management option allows you to enter and maintain any necessary notes regarding your clients.

### Entering & Saving New Notes
1. Search and select your client
2. Select Case Management in the Navigator.
3. Select the New Note action button located below the header.
4. Select the Encounter Type text box and select an applicable option
5. Select the appropriate program.
6. Select Add next to the Components of Service text box and select the applicable option (You can select multiple components of service).
7. Select the Message text box field and enter a message.
8. Select Case Note Status.
9. Select Save and Close.

### Editing Your Notes
A case note can only be edited if the case note status is marked as incomplete. When looking at notes in Summary View both the Note icon and the Note History icon will appear next to any notes that can be edited, they are notes that are incomplete.

Note Edit/Sign Icon [ ] allows you to Edit and Complete the Note.

Note History Icon [ ] allows you to View all Completed Notes.

### Editing a Note For a Previous Legal Note
1. Search any of your previous notes.
2. Select the Edit/Sign Note icon.
3. Add any additional notes to the current message.
4. Change Case Note Status to Complete.
5. Select Save and Close.

### Complete Your Notes
Once you have completed your notes you can mark them as completed. The notes are then saved and become **READ ONLY**. You can complete any of your notes from either the Summary or Detail view.

### Complete All Your Notes through the Notes Detailed View
1. Access the Notes Detailed View and find all Notes Edit/Sign Icons.
2. Mark them all as Completed, one at a time
3. Select Save and Close.

### Viewing Existing Notes
1. Select the Notes History Icon located next to the Date. The Archived Note Update History page will be displayed allowing you to read the completed note attached to your client.
2. Review all History Notes.
3. Select Save and Close.

### Searching your Notes by Case Note Status
1. Search and select your client.
2. Select Case Management in the Navigator.
3. Select the arrow next to the Case Note Status and select Complete.
4. Select Search. The Search filter will only display Completed Notes.

### Creating a Client Consent Form
1. Search and select your client.
2. Select Consent in the Navigator.
3. Select New Consent located below the header.
4. Enter the necessary information
5. Select Save
6. Select Sign to display the signature pop up window.
7. Have the client sign the digital signature pad.
8. Select the Save Signature on the Signature popup.
9. The Signature was saved popup will appear. Select Ok to close the popup.
10. Select Save to save the information entered.
11. Select Save and Close.

### Viewing a Client Consent Form
1. Search and select your client.
2. Select Consent in the Navigator.
3. Select View listed under the Actions column.
4. Select Print located below the header. A pop up will be displayed asking if you would like to open or save this file.
5. Select Open on the popup window. The pop up of the consent form will be displayed.
6. To print the consent form you would select the printer icon located at the top right corner of the consent form popup.
7. Select Save and Close.

### Withdraw a Client Consent Form
1. Search and select your client.
2. Select Consent in the Navigator.
3. Select Withdraw located below the Actions column.
4. Click the Close.

### Creating a New Task
1. Search and select your client.
2. Select Tasks in the Navigator.
3. Select New located under the header.
4. Select the appropriate Program.
5. Enter a message.
6. Select Save and Close.

### Entering a Client Complaint
1. Search and select your client.
2. Select Complaint in the Navigator.
3. Select New Complaint located under the header.
4. Select the appropriate Source and Method of Contact.
5. Enter the Complainants' full name.
6. Select the appropriate program from the drop down box.
7. If the complaint is related to Toronto Shelter Standards then select the check box next to Is Complaint Related to Toronto Shelter Standards and select the appropriate options, and enter the appropriate information for the Description of Complaint/Narrative, Was the Complainant Satisfied with the Outcome, and Time Spent on Complaint.
8. Select Save and Close.

### Updating a Client Complaint
1. Search and select your client.
2. Select Complaint in the Navigator.
3. Select the complaint number displayed under the Complaint ID column.
4. Make any necessary
5. Select the Save action button to save the information recorded. Once the status has changed to complete, the information can no longer be updated it can only be viewed.
6. Select Save and Close.

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