This SMIS enhancement (May 2017) release version 3.3 addresses the highest priority change requests and bug fixes.

There are a total of 4 enhancements and 7 bug fix items in this release. All of which will be apparent to end users. All 11 changes are detailed in the following pages.

Please note that this document will also be available on line at
http://www.toronto.ca/housing/smis/smisuser.htm

Enhancements:

1. Bed Log Report: Add complete header to all pages
2. Updating Date Of Birth and Gender on Active Intakes
3. Context Sensitive Help
4. Changes to System and Facility Messages

Bug Fixes:

5. The Deceased Disposition for Family Head no longer cascades to all Family Members
6. Admission & Discharge History Listing Inconsistencies
7. Family Head discharge – Already Discharged Dependent Bug
8. Client Safekeeping Report Consistencies and Performance Issues
9. Password character handling
10. Paged Screens Sorting
11. Unable to upload file to Attachments

1. Bed Log Report: Add complete header to all pages

Complete headers are now added to all pages of the Bed Log Report in PDF format.

All SMIS users will notice this change.

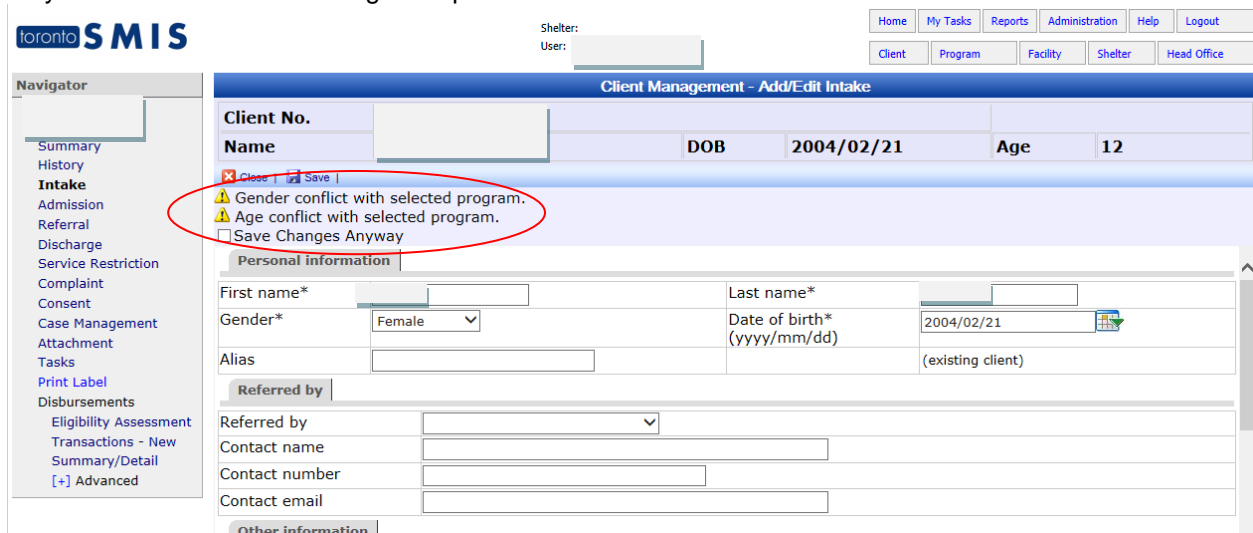## 2. Updating Date Of Birth and Gender on Active Intakes

Currently, on an active intake for an admitted client, a user may update most of the client fields (name, alias, etc). However, they are not able to update the client's date of birth or gender.

This change will enable staff to update a client's DOB (date of birth) and gender after admission, prior to discharge.

If however, the change in the gender or DOB causes a conflict with the Program's profile, then a warning message will appear for user confirmation to continue with the save.

All SMIS users will notice this change.

An example of the warnings for confirmation prior to saving a change to a Client's Gender and DOB if they conflict with a Shelter Program's profile.
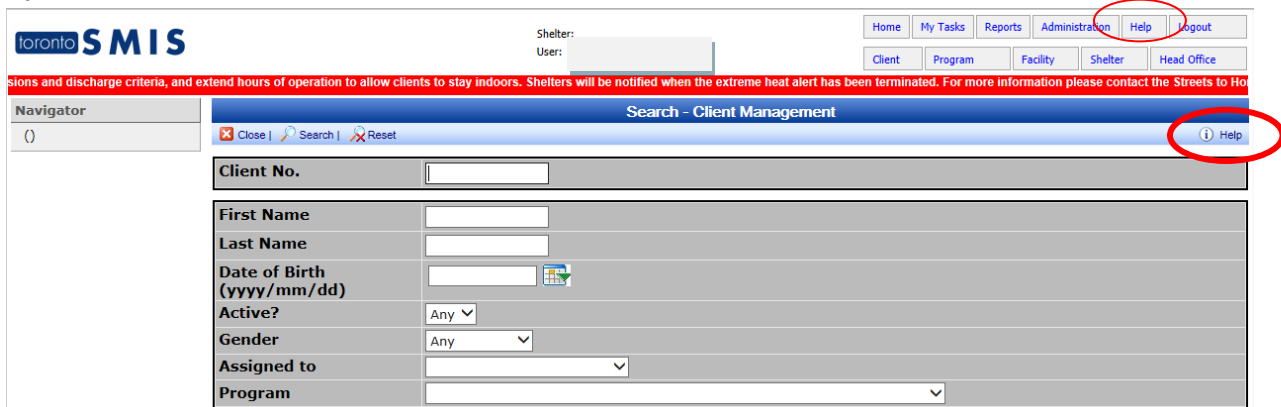
3. Context Sensitive Help

New context sensitive help has been added to SMIS. A new ⓘ Help action button has been added to the extreme right of the SMIS action bar for most SMIS screen. When clicked, a pop-up window will appear with help pertaining to that particular screen only.

The original Help button on the Nav Bar at the top right of the page will now take the user to a web link where the entire online SMIS User Guide can be access.

All SMIS Users will see this change.

For example, in the Client Search screen, the new Help action button is added on the right of the Action Bar:

Below is the resulting pop-up help window tab for the SMIS Client Search screen:

To Search for a Client

Updated on August 2016

Home > Client Management (Select Client) >

Business Purpose:

A client search must first be performed using SMIS to determine if the client is an existing client or a new client. You can search by entering either the clients first and last name, Date of Birth, Assigned to or Program. If multiple search criteria are used, then the results be a match to the combination of the search values used.
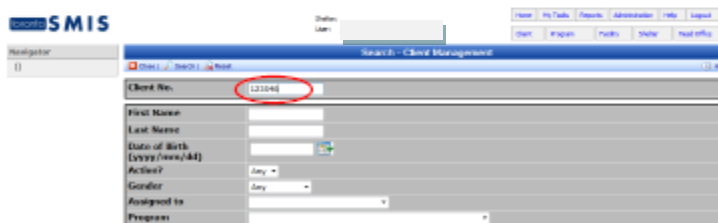
The Search process is to be repeated every time a client enters your shelter.

If **Name** fields are used in the client search, then the search function will check clients first name, last name and alias every time a search is conducted even if you type one of the names into the wrong field. For example, typing the last name Pitt into the **First Name** field will find clients with first name or last name or alias beginning with "Pitt". Also, the search is NOT case-sensitive.

An example of a multiple field search, if you select *Yes* for Active? and a particular Program, then you will get a list of clients who are currently active/admitted into any shelter in SMIS and are currently intake or have had an intake in the selected Program before.

How to:

1. If you know the client's SMIS Client number, then you can enter it into the Client No. field and click Search.

Or else,
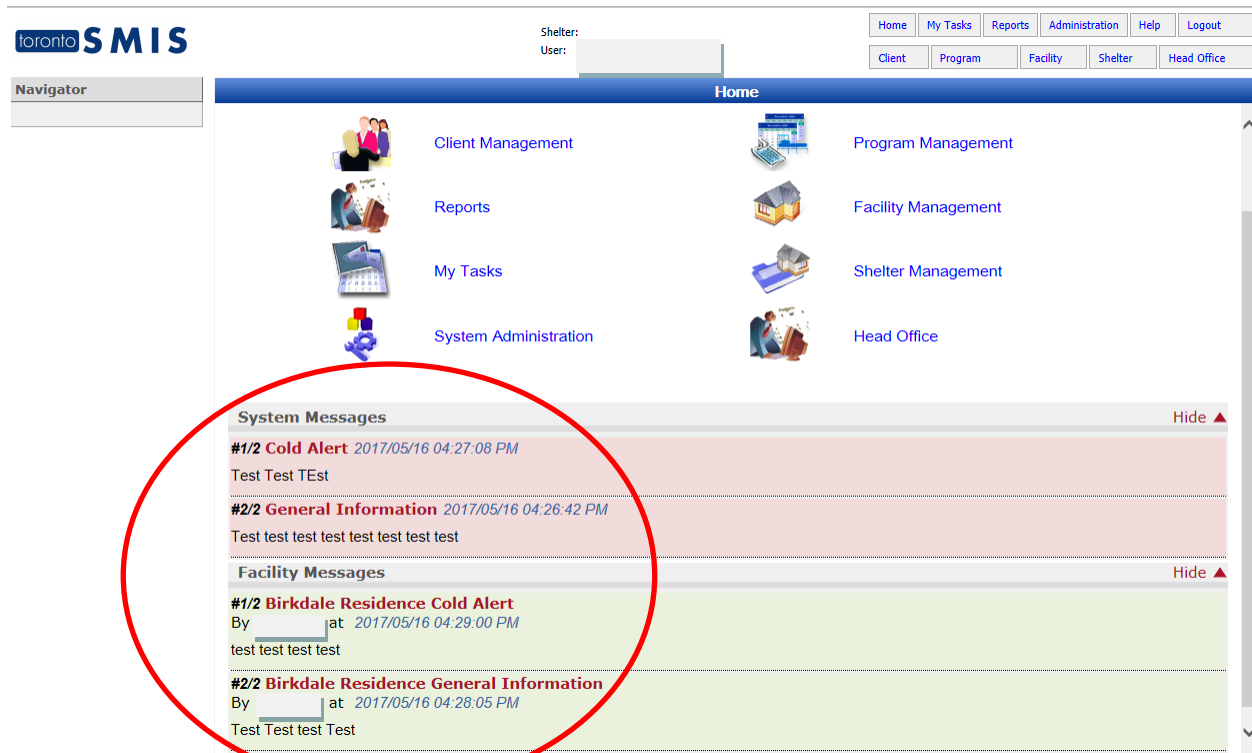
For the full SMIS help manual, go to: SMIS Help Manual

4. Changes to System and Facility Messages

On the SMIS Home and System Administration pages, the following changes were made to the System (in pink) and Facility (in light green) Message areas:

1. The date has been moved to the right of message type header.
2. The message is moved up one line so that there is only 1 blank line between the message type and the message.
3 Now, there is only one blank line after the message, before the next entry.
4. The sort order is now by created date, not the updated date, in reversed chronological order (i.e. latest created message on top).

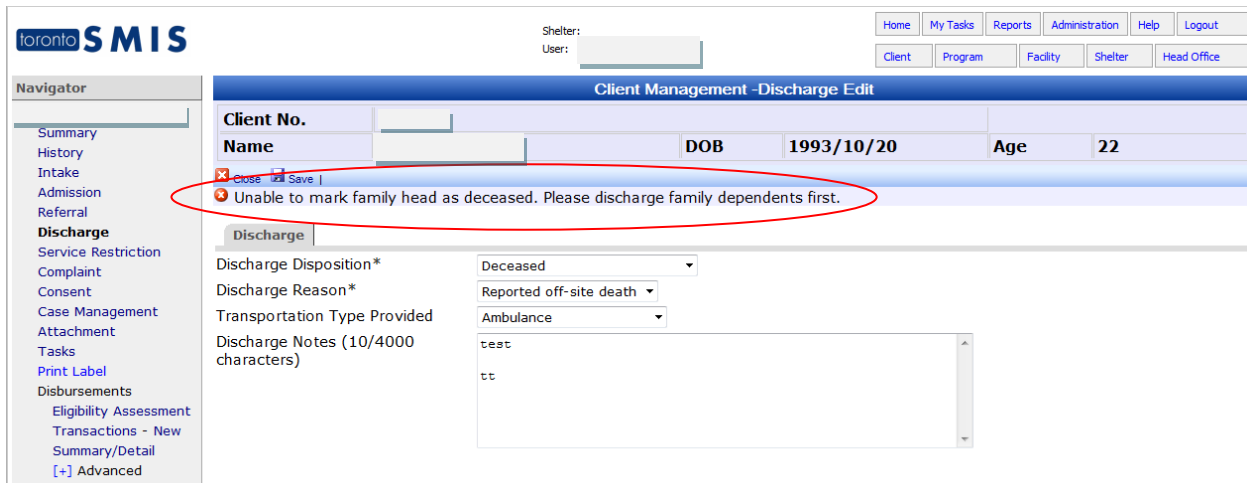*All SMIS Users will see this change.*

5. The Deceased Disposition for Family Head no longer cascades to all Family Members

In SMIS, currently, when discharging a head of a family, the same discharge disposition gets cascaded down to all members of the family. So, in the case that the head of the family is deceased, this disposition is erroneously cascaded down to all members of the family upon discharge.
Therefore, the change here is that when trying to discharge the head of a family with a disposition of "Deceased", if there are still members left in the family, it is blocked by an error message: "Unable to mark family head as deceased. Please discharge family dependents first."

However, when trying to discharge a non-head member of a family, "Deceased" disposition is allowed.

All SMIS users will notice this change.

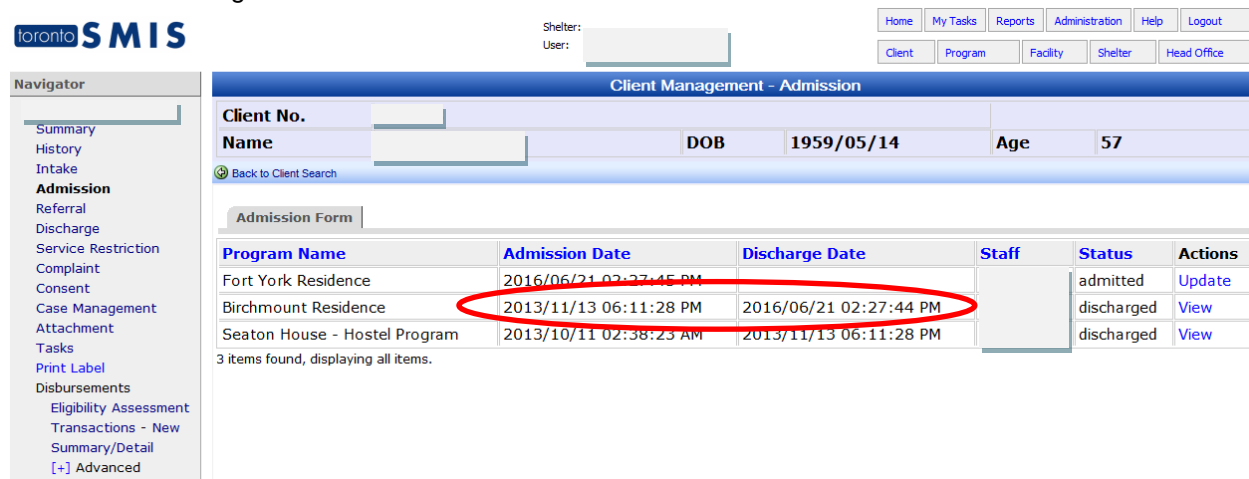

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6. Admission & Discharge History Listing Changes

Client Management – Admission listing displays the client admission dates as well as the corresponding discharge dates sorted by admission date with the most recent on top.

Client Management – Discharge listing displays the client discharge dates as well as the corresponding admission dates sorted by discharge date with the most recent on top.

Client Management – History listing displays the automatic discharge record below (earlier than) the new admission record sorted with the most recent on top.

All SMIS Users will see this change.

Example of Client Management - Admission listing showing Admission Dates and where applicable the associated Discharge Dates:

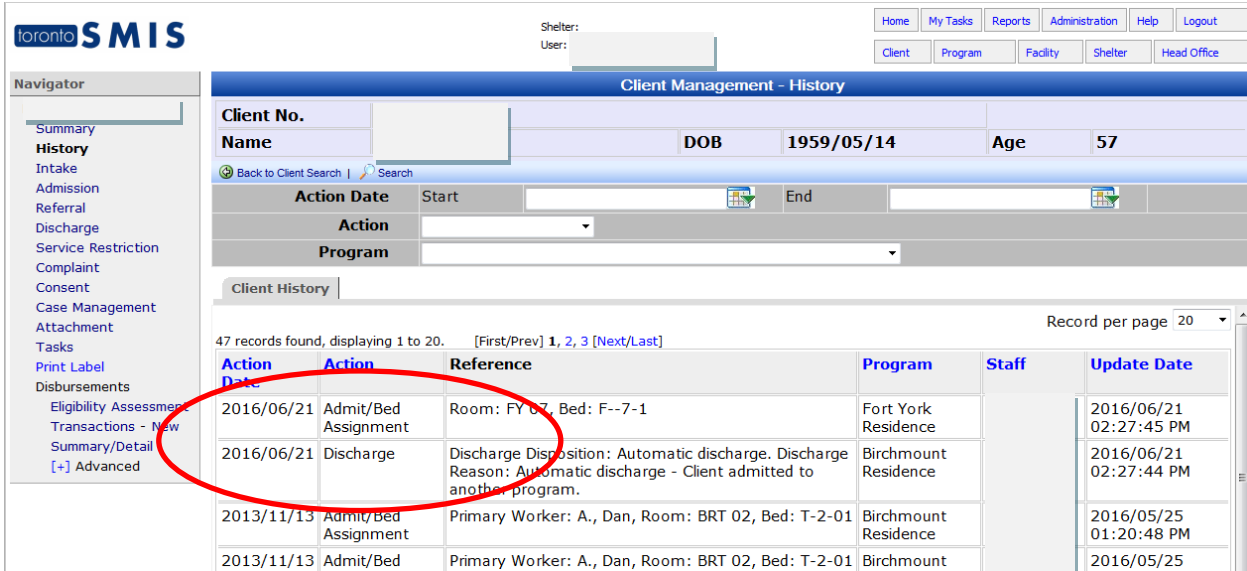Example of Client Management - Discharge listing showing Discharge Dates and associated Admission Dates:

Example of Client Management - History listing showing sort order of an Automatic Discharge record proceeding (below when the default sort is reversed chronological order) the associated new Admission record:

7. Family Head discharge – Already Discharged Dependent Bug

When discharging a family head, the discharge date for any previously discharged family members will now remain the same as it was before.

All SMIS Users will see this change.

Below shows the discharge date/time for the head of the family which was discharged *after* a member discharge:

Below shows the discharge date/time for the already discharged dependent member of the family which now remains the same as before, i.e. did not change to the family head's discharge date/time:

8. Client Safekeeping Report Changes and Performance Issues
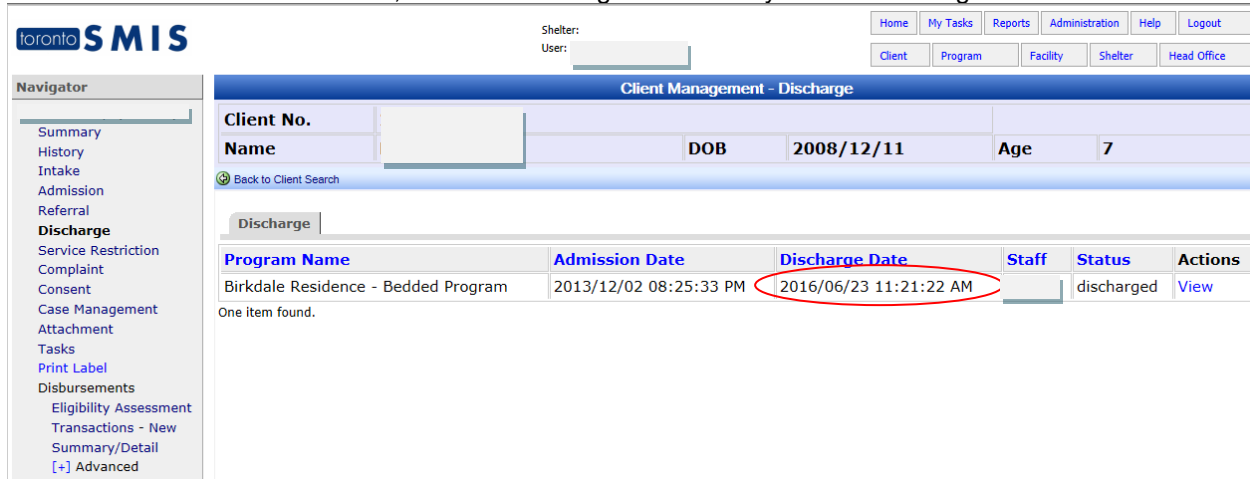
The Client Safekeeping Report running at the Shelter and Facility level, will no longer include clients with $0. balances, alike the current Program level report.

Also, all three level Client Safekeeping Reports performance have been optimized and runs faster now.

All SMIS Users will see this change.

Below is a sample Shelter level Client Safekeeping Report, re-sorted starting with the lowest $Balance, which is $10. Notice there are no $0.00 Balances on this report.

9. Password character handling

Password rules have been enhanced to allow for lengths up to 256 characters, can contain blanks, any special characters, letters and numbers.

All SMIS Users will see this change.

For assistance contact SSHA IT team

SMIS QA Environment 10G (smis_dba@shistsold)

USER ID

PASSWORD •••••••••••••••••••

LOG-IN   RESET

Hostel Services   Shelter, Support & Housing Administration
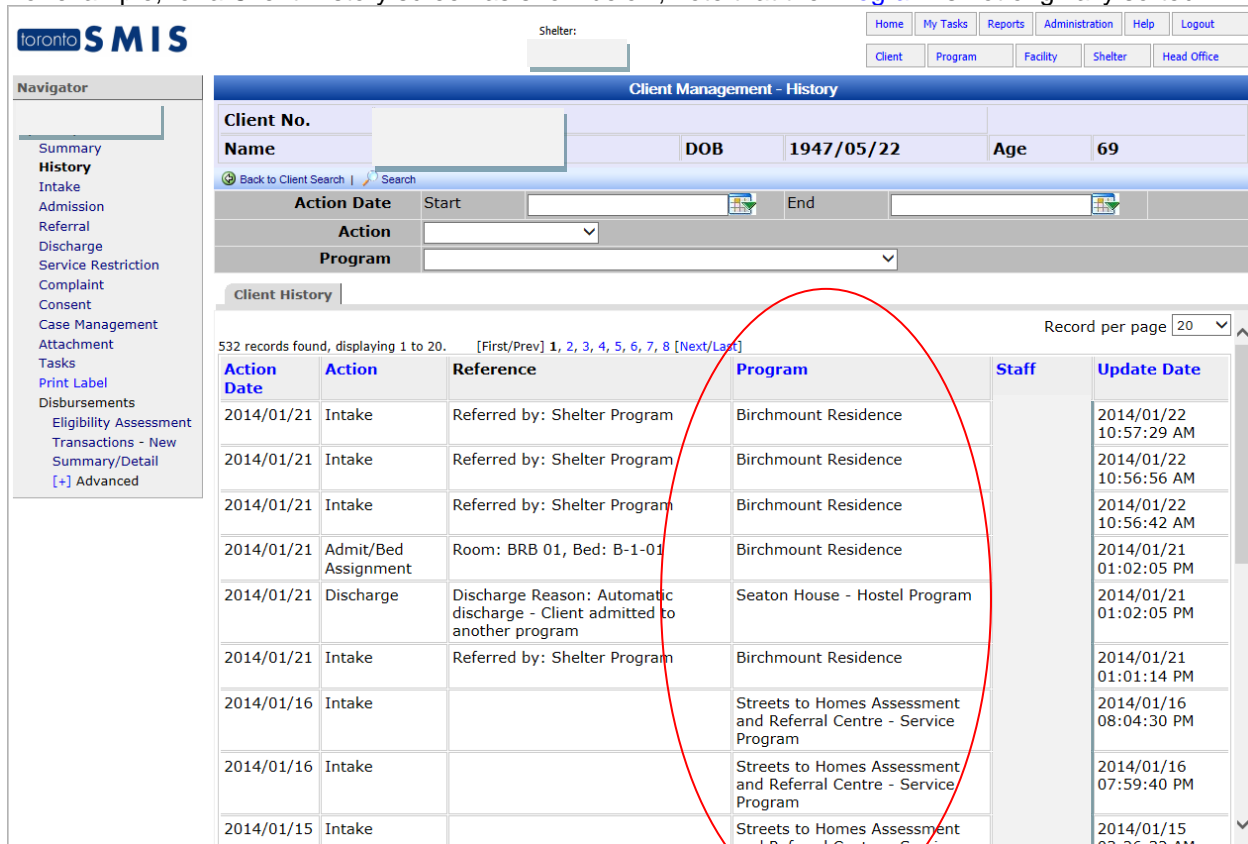
10. Paged Screens Sorting

Previously, when you sort a listing in SMIS by clicking on the column headings of a particular page, the sort will only include the records on that page.

Now, for Multi-page (screen) listings, the ascending or descending sort will include all values on all pages.

All SMIS Users will see this change.

For example, for a Client History screen as show below, note that the Program is not originally sorted:

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After clicking on the **Program** column heading, it results in an ascending sort, see the first page (1) and last page (8) below: Notice the client history records are now sorted according to Program in ascending alphabetical order including all pages.

532 records found, displaying 1 to 20.   [First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Action Date	Action	Reference	Program	Staff	Update Date
2014/01/21	Intake	Referred by: Shelter Program	Birchmount Residence		2014/01/22 10:57:29 AM
2014/01/21	Intake	Referred by: Shelter Program	Birchmount Residence		2014/01/22 10:56:56 AM
2014/01/21	Intake	Referred by: Shelter Program	Birchmount Residence		2014/01/22 10:56:42 AM
2014/01/21	Admit/Bed Assignment	Room: BRB 01, Bed: B-1-01	Birchmount Residence		2014/01/21 01:02:05 PM
2014/01/21	Intake	Referred by: Shelter Program	Birchmount Residence		2014/01/21 01:01:14 PM
2014/01/03	Referral	Seaton House - Hostel Program	Birchmount Residence		2014/01/03 08:24:09 AM
2012/11/12	Intake		Central Family Intake		2012/11/12 06:01:11 PM
2012/11/12	Intake		Central Family Intake		2012/11/12 04:40:47 PM
2012/11/12	Intake		Central Family Intake		2012/11/12 04:34:47 PM
2013/03/29	Discharge	Discharge Reason: Other	Christie Ossington Extreme Weather Program		2013/03/29 11:53:45 PM

Client History

		Failed to return	Emergency Bed Program		02:33:14 AM
2013/05/03	Admit/Bed Assignment	Room: Main Dormitory, Bed: 304A	Salvation Army - Maxwell Meighen Emergency Bed Program		2013/05/03 09:31:07 AM
2013/05/03	Intake	Referred by: Self	Salvation Army - Maxwell Meighen Emergency Bed Program		2013/05/03 09:28:54 AM
2013/05/03	Discharge	Discharge Reason: Failed to return	Salvation Army - Maxwell Meighen Emergency Bed Program		2013/05/03 04:07:19 AM
2013/04/27	Admit/Bed Assignment	Room: Main Dormitory, Bed: 102G	Salvation Army - Maxwell Meighen Emergency Bed Program		2013/04/27 01:09:53 AM
2013/04/27	Intake		Salvation Army - Maxwell Meighen Emergency Bed Program		2013/04/27 01:09:02 AM
2013/04/27	Discharge	Discharge Reason: Failed to return	Salvation Army - Maxwell Meighen Emergency Bed Program		2013/04/27 12:31:36 AM
2013/04/26	Admit/Bed Assignment	Room: Main Dormitory, Bed: 102H	Salvation Army - Maxwell Meighen Emergency Bed Program		2013/04/26 02:37:18 AM
2013/04/26	Intake		Salvation Army - Maxwell Meighen Emergency Bed Program		2013/04/26 02:37:00 AM
2013/04/26	Discharge	Discharge Reason: Failed to return	Salvation Army - Maxwell Meighen Emergency Bed Program		2013/04/26 12:36:17 AM
2013/03/31	Admit/Bed Assignment	Room: Main Dormitory, Bed: 102H	Salvation Army - Maxwell Meighen Emergency Bed Program		2013/03/31 12:11:40 AM
2013/03/31	Intake		Salvation Army - Maxwell Meighen Emergency Bed Program		2013/03/31 12:11:17 AM

532 records found, displaying 141 to 160.   [First/Prev] 4, 5, 6, 7, 8, 9, 10, 11 [Next/Last]

11. Unable to upload file to Attachments

Previously, after a client (A) from Program(1) is merged into another client (B) in Program(2), users with role access to attachments in Program(1) were then not able to access the original client(A)'s attachments thru client (B). They should have been able to access these historical attachments.

After this fix, for merged Clients in SMIS, users with proper Program role access to attachments should still be able to access the clients attachments previously uploaded before the merge. Of course, only for the attachments for clients from the user's respective Program(s).

Users from both the client's before and after merge Programs can still add new attachments for the client within their respective Programs.

All SMIS Users will see this change.