



## SMIS Release Notes

Version 3.3

May, 2017

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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.*


**Bed Check**
printed on 2016-06-21 03:15 PM  
printed by L. Ben

Fort York Residence							
CLIENT_NO	LAST_NAME	FIRST_NAME	ASSIGNED ROOM	ASSIGNED BED	OCCUPIED ROOM	OCCUPIED BED	PRESENT OVERNIGHT PASS
			FY 11	F-11-2			<input type="checkbox"/>
			FY 11	F-11-3			<input type="checkbox"/>
			FY 11	F-11-4			<input type="checkbox"/>
			FY 11	F-11-5			<input type="checkbox"/>
			FY 11	F-11-6			<input type="checkbox"/>
			FY 11	F-11-7			<input type="checkbox"/>
			FY 11	F-11-8			<input type="checkbox"/>
	ROOM: FY 12						
			FY 12	F-12-2			<input type="checkbox"/>
			FY 12	F-12-3			<input type="checkbox"/>
			FY 12	F-12-4			<input type="checkbox"/>
ROOM: FY 13							
			FY 13	F-13-2			<input type="checkbox"/>
	ROOM: FY 15						
			FY 15	F-15-1			<input type="checkbox"/>
			FY 15	F-15-2			<input type="checkbox"/>
			FY 15	F-15-3			<input type="checkbox"/>
			FY 15	F-15-4			<input type="checkbox"/>

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

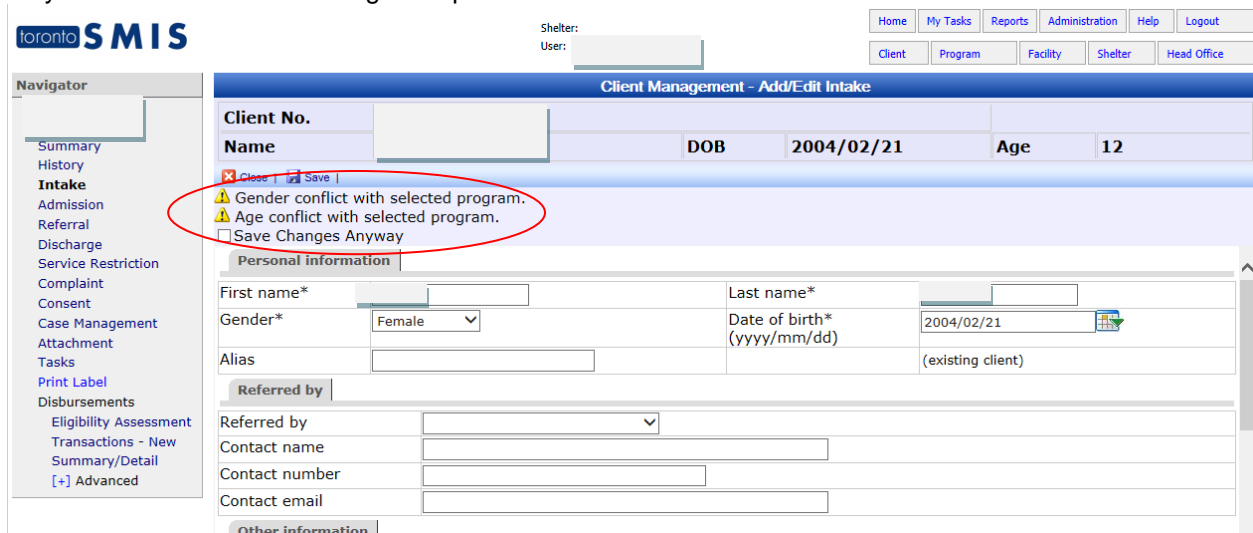
Currently, on an active intake for an admitted client, a user may update most of the client fields (name, alias, etc). However, they are not able to update the client's date of birth or gender.

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.



The screenshot shows the 'Client Management - Add/Edit Intake' form. At the top, there are navigation tabs: Home, My Tasks, Reports, Administration, Help, Logout, Client, Program, Facility, Shelter, and Head Office. The form displays client information: Client No., Name, DOB (2004/02/21), and Age (12). Below this, a red circle highlights two warning messages: 'Gender conflict with selected program.' and 'Age conflict with selected program.' Below the warnings are buttons for 'Close', 'Save', and 'Save Changes Anyway'. The form is divided into sections: 'Personal information' (First name\*, Last name\*, Gender\*, Date of birth\*, Alias) and 'Referred by' (Referred by, Contact name, Contact number, Contact email). The 'Other information' section is also visible at the bottom.

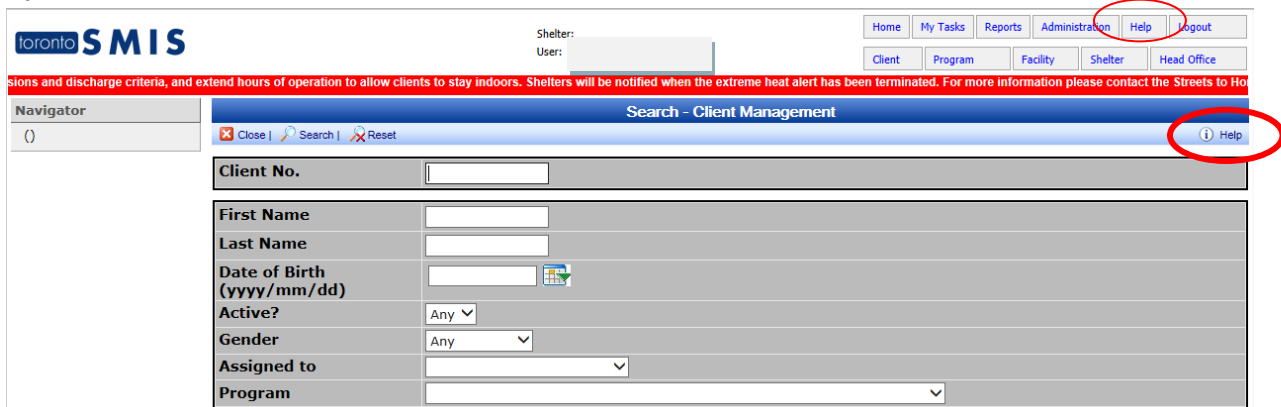
## 3. Context Sensitive Help

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:



The screenshot shows the SMIS interface for the 'Search - Client Management' screen. At the top, there is a navigation bar with links: Home, My Tasks, Reports, Administration, Help, and Logout. Below this is a secondary bar with links: Client, Program, Facility, Shelter, and Head Office. The main content area has a title bar 'Search - Client Management' with buttons for Close, Search, and Reset. On the far right of this title bar, a new 'Help' button with an information icon is circled in red. Below the title bar, there are several input fields for searching: Client No., First Name, Last Name, Date of Birth (with a calendar icon), Active? (dropdown), Gender (dropdown), Assigned to (dropdown), and Program (dropdown).

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.

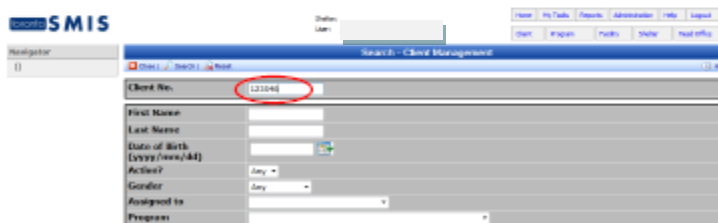
The Search process is to be repeated every time a client enters your shelter.

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,

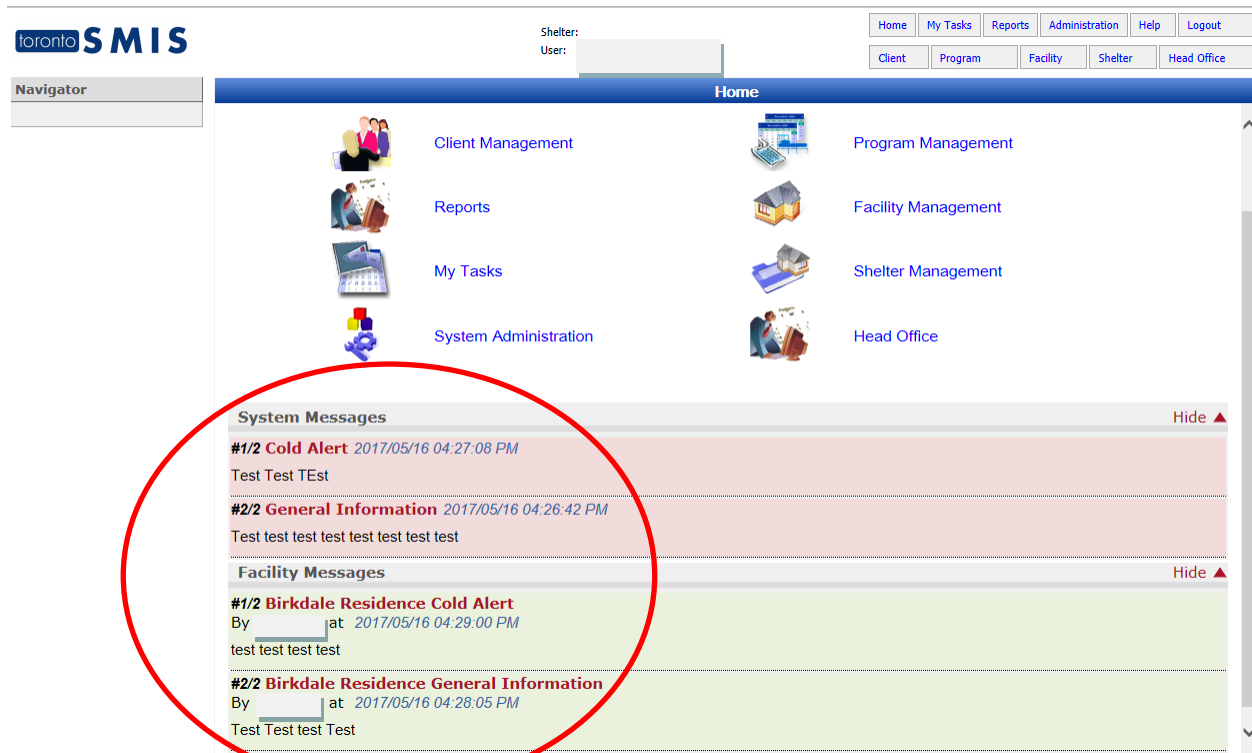
For the full SMIS help manual, go to: [SMIS Help Manual](#)

## 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.*



The screenshot shows the SMIS Home page with a navigation menu on the left and a main content area. The main content area has a header with 'Home' and a 'Shelter: User:' dropdown. Below the header, there are icons for Client Management, Reports, My Tasks, System Administration, Program Management, Facility Management, Shelter Management, and Head Office. The 'System Messages' section is highlighted in pink and contains two messages: '#1/2 Cold Alert' and '#2/2 General Information'. The 'Facility Messages' section is highlighted in light green and contains two messages: '#1/2 Birkdale Residence Cold Alert' and '#2/2 Birkdale Residence General Information'. A red circle highlights the message area.

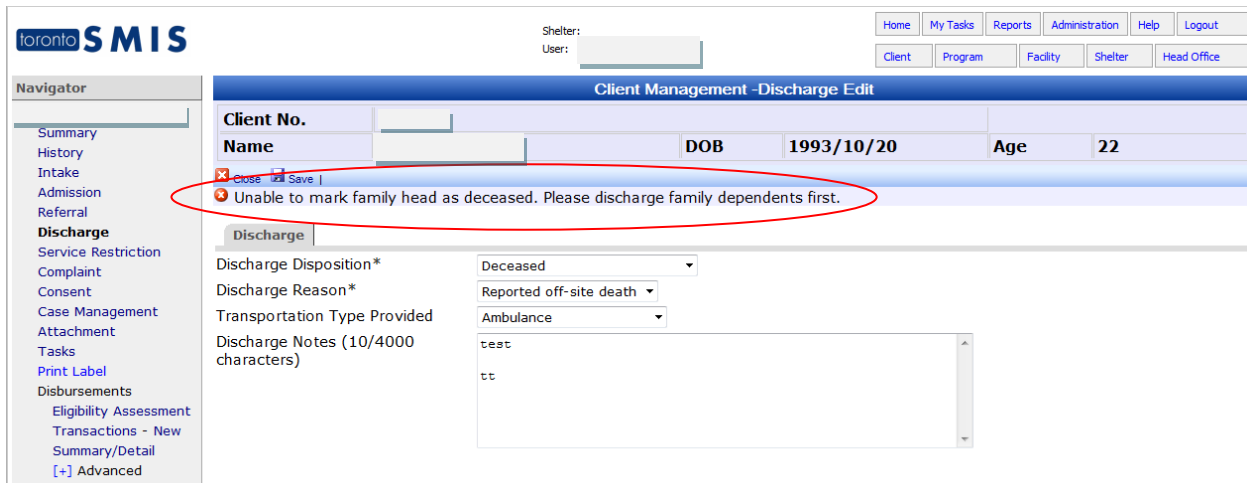
## 5. The Deceased Disposition for Family Head no longer cascades to all Family Members

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.*



The screenshot shows the SMIS interface with the "Client Management - Discharge Edit" form. The form displays client information: Client No., Name, DOB (1993/10/20), and Age (22). Below this, a red error message is displayed: "Unable to mark family head as deceased. Please discharge family dependents first." The error message is circled in red. The form also includes a "Discharge" section with dropdown menus for "Discharge Disposition\*" (set to "Deceased") and "Discharge Reason\*" (set to "Reported off-site death"), and a "Transportation Type Provided" dropdown (set to "Ambulance"). A text area for "Discharge Notes (10/4000 characters)" contains the text "test" and "tt".

## 6. Admission & Discharge History Listing Changes

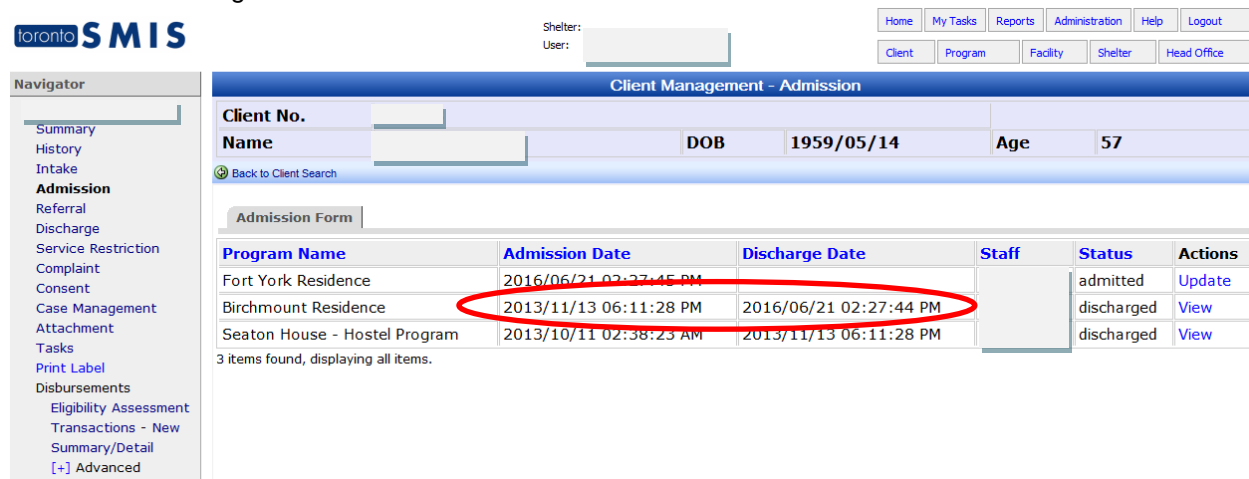
Client Management – Admission listing displays the client admission dates as well as the corresponding discharge dates sorted by admission date with the most recent on top.

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:



Shelter:  User:

Home My Tasks Reports Administration Help Logout

Client Program Facility Shelter Head Office

**Client Management - Admission**

Client No.

Name  DOB 1959/05/14 Age 57

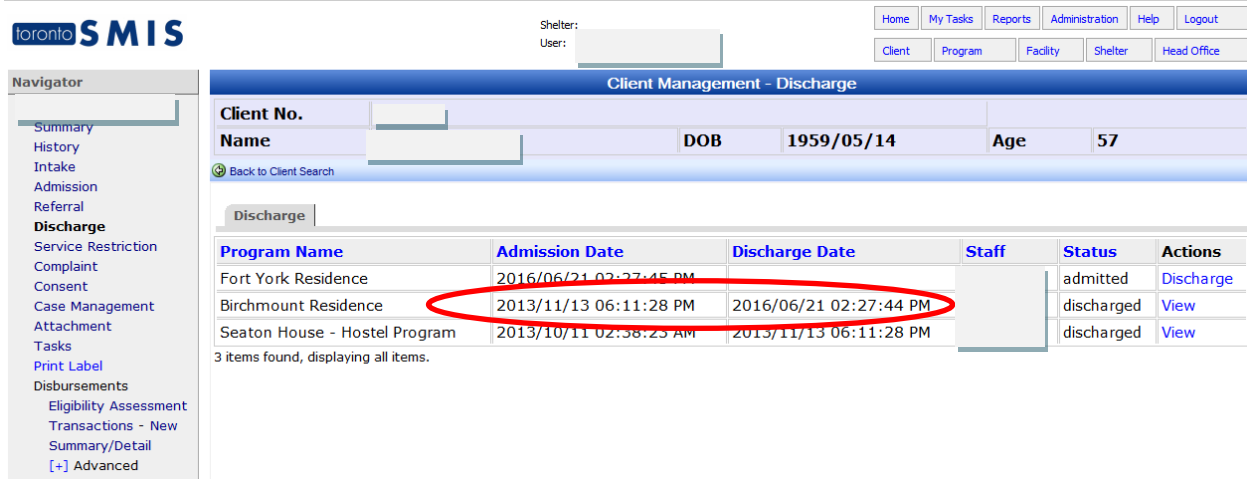
[Back to Client Search](#)

**Admission Form**

Program Name	Admission Date	Discharge Date	Staff	Status	Actions
Fort York Residence	2016/06/21 02:27:45 PM			admitted	<a href="#">Update</a>
Birchmount Residence	2013/11/13 06:11:28 PM	2016/06/21 02:27:44 PM		discharged	<a href="#">View</a>
Seaton House - Hostel Program	2013/10/11 02:38:23 AM	2013/11/13 06:11:28 PM		discharged	<a href="#">View</a>

3 items found, displaying all items.

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

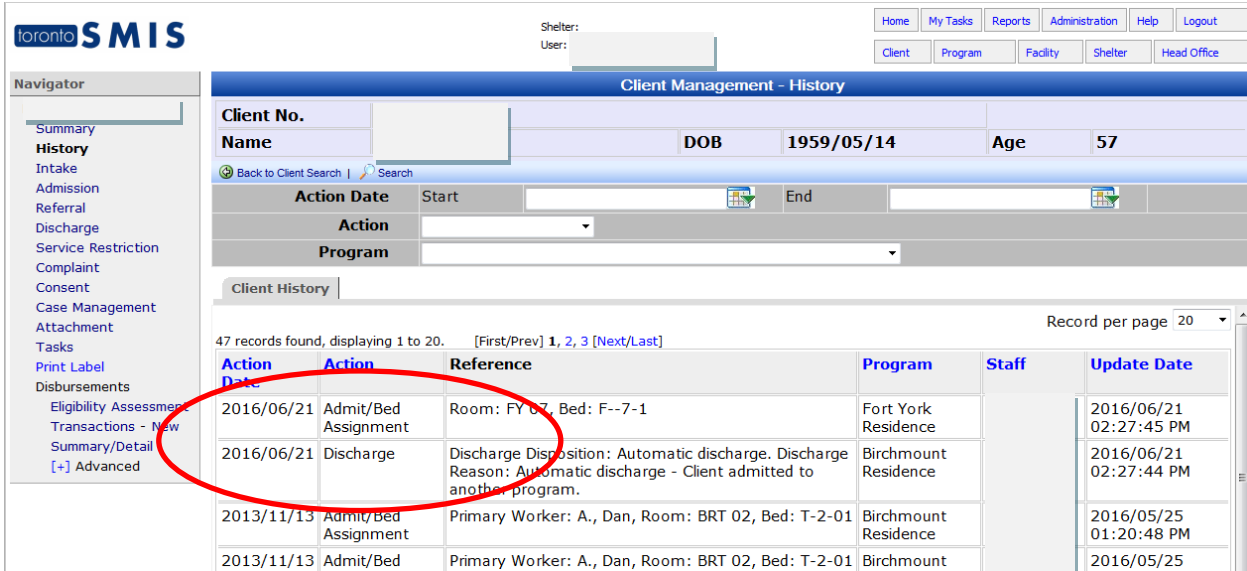


The screenshot shows the 'Client Management - Discharge' interface. The client's name is redacted, and their DOB is 1959/05/14, making them 57 years old. A table lists the client's discharge history:

Program Name	Admission Date	Discharge Date	Staff	Status	Actions
Fort York Residence	2016/06/21 02:27:45 PM			admitted	<a href="#">Discharge</a>
Birchmount Residence	2013/11/13 06:11:28 PM	2016/06/21 02:27:44 PM		discharged	<a href="#">View</a>
Seaton House - Hostel Program	2013/10/11 02:58:25 AM	2013/11/13 06:11:28 PM		discharged	<a href="#">View</a>

3 items found, displaying all items.

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:



The screenshot shows the 'Client Management - History' interface. The client's name is redacted, and their DOB is 1959/05/14, making them 57 years old. A table lists the client's history:

Action Date	Action	Reference	Program	Staff	Update Date
2016/06/21	Admit/Bed Assignment	Room: FY 07, Bed: F--7-1	Fort York Residence		2016/06/21 02:27:45 PM
2016/06/21	Discharge	Discharge Disposition: Automatic discharge. Discharge Reason: Automatic discharge - Client admitted to another program.	Birchmount Residence		2016/06/21 02:27:44 PM
2013/11/13	Admit/Bed Assignment	Primary Worker: A., Dan, Room: BRT 02, Bed: T-2-01	Birchmount Residence		2016/05/25 01:20:48 PM
2013/11/13	Admit/Bed	Primary Worker: A., Dan, Room: BRT 02, Bed: T-2-01	Birchmount		2016/05/25

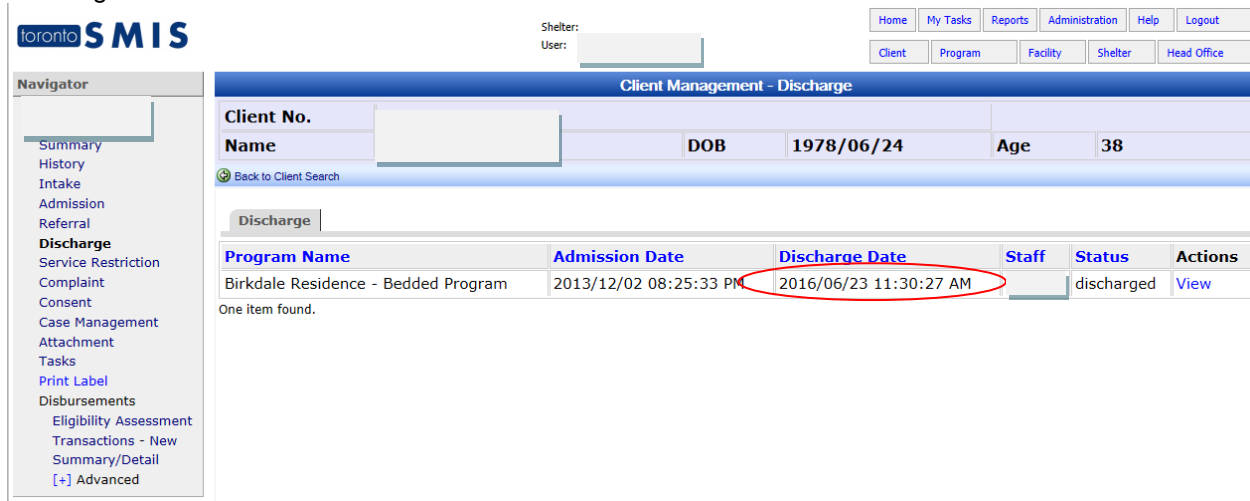
47 records found, displaying 1 to 20. [First/Prev] 1, 2, 3 [Next/Last]

## 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:

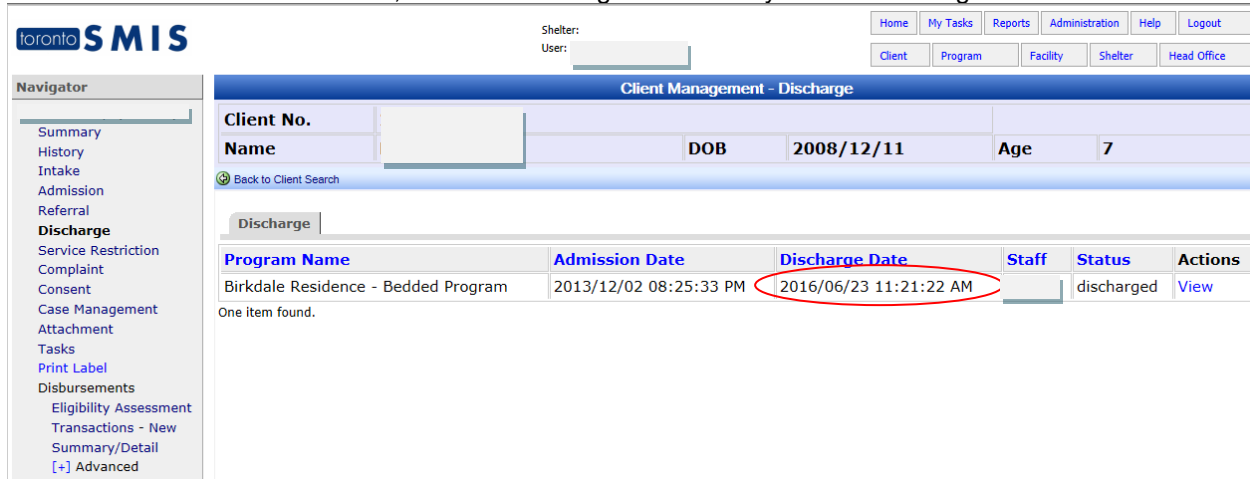


The screenshot shows the 'Client Management - Discharge' page for a client. The client's name is redacted, but their DOB is 1978/06/24 and their age is 38. The 'Discharge' tab is selected, showing a table with the following data:

Program Name	Admission Date	Discharge Date	Staff	Status	Actions
Birkdale Residence - Bedded Program	2013/12/02 08:25:33 PM	2016/06/23 11:30:27 AM		discharged	<a href="#">View</a>

The 'Discharge Date' is circled in red. Below the table, it says 'One item found.'

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:



The screenshot shows the 'Client Management - Discharge' page for a client. The client's name is redacted, but their DOB is 2008/12/11 and their age is 7. The 'Discharge' tab is selected, showing a table with the following data:

Program Name	Admission Date	Discharge Date	Staff	Status	Actions
Birkdale Residence - Bedded Program	2013/12/02 08:25:33 PM	2016/06/23 11:21:22 AM		discharged	<a href="#">View</a>

The 'Discharge Date' is circled in red. Below the table, it says 'One item found.'


## 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.



### Client Safekeeping Balance Report

Print Close

Printed: 2016/08/15 03:00:25 PM

Reporting Period: 2016/08/15

End Date:

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

Program	Total Clients	Balance
Birkdale Residence - Bedded Program	86	\$7,084.00
<b>Total</b>	<b>86</b>	<b>\$7,084.00</b>

Program	Client No.	Last Name	First Name	First Trans Date	Last Trans Date	Balance	Currently Active
Birkdale Residence - Bedded Program				2015/11/25 11:57:38 AM	2015/11/25 11:57:38 AM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/11/05 02:37:58 PM	2015/11/05 04:13:40 PM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/11/05 04:22:58 PM	2015/11/05 04:25:49 PM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/11/06 11:09:05 AM	2015/11/06 11:11:36 AM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/11/10 02:17:04 PM	2015/11/10 02:17:04 PM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/11/10 02:17:04 PM	2015/11/10 02:17:04 PM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/11/10 02:17:04 PM	2015/11/10 02:17:04 PM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/11/06 12:32:12 PM	2015/11/06 12:34:47 PM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/11/12 10:59:02 AM	2015/11/12 11:04:32 AM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/11/09 03:01:16 PM	2015/11/09 03:04:35 PM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/11/12 09:44:31 AM	2015/11/12 09:48:49 AM	\$10.00	Yes
Birkdale Residence - Bedded Program				2015/06/23 11:25:10 AM	2015/06/23 11:25:10 AM	\$100.00	No
Birkdale Residence - Bedded Program				2016/01/22 10:29:38 AM	2016/01/22 10:31:01 AM	\$13.00	No
Birkdale Residence - Bedded Program				2016/01/27 02:56:18 PM	2016/01/27 02:57:39 PM	\$13.00	No
Birkdale Residence - Bedded Program				2016/03/03 04:06:57 PM	2016/03/03 04:39:15 PM	\$13.00	No

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

## 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

**toronto SMIS**  
Shelter Management  
Information System



SMIS QA Environment 10G (smis\_dba@shistsold)

USER ID

PASSWORD

LOG-IN

RESET

Hostel Services    Shelter, Support & Housing Administration



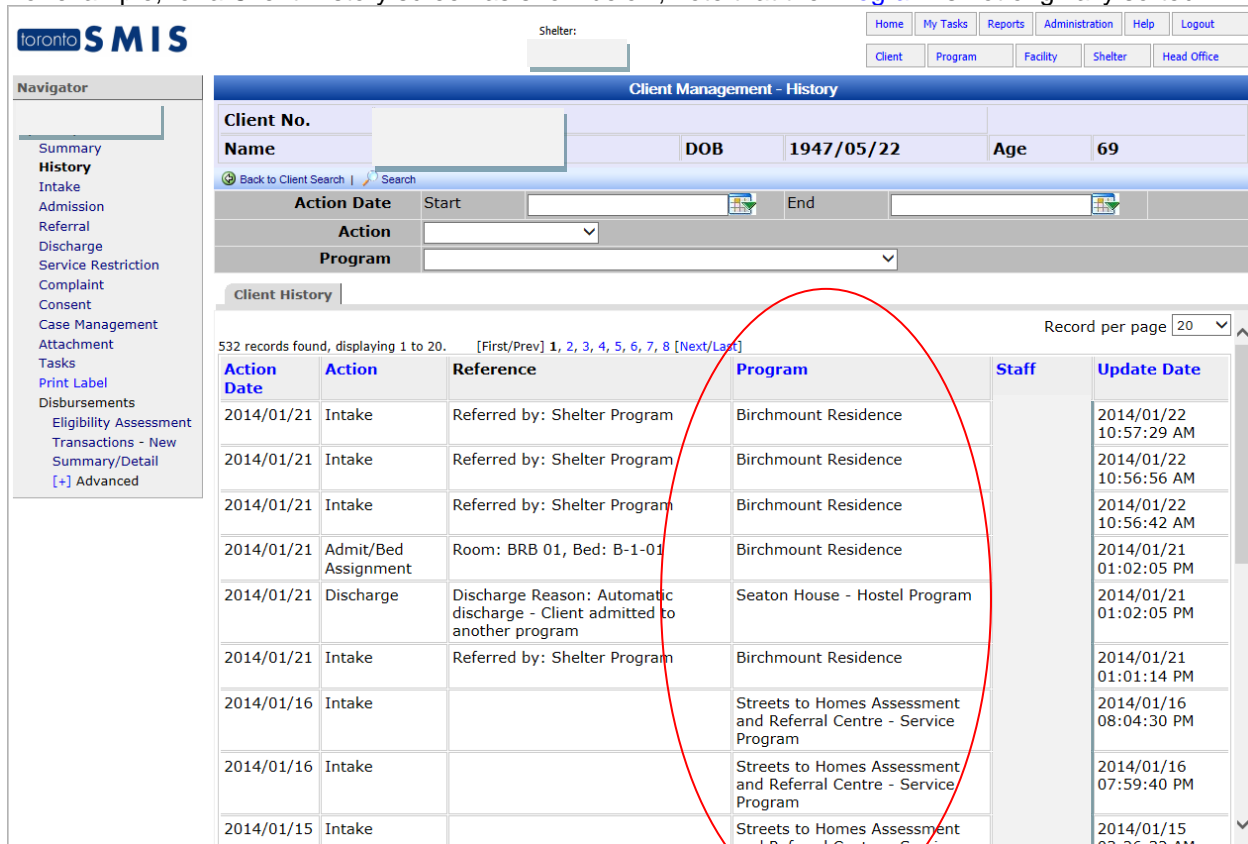
## 10. Paged Screens Sorting

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:



**Client Management - History**

Client No. [Redacted] Name [Redacted] DOB 1947/05/22 Age 69

Back to Client Search | Search

Action Date Start [ ] End [ ]

Action [ ]

Program [ ]

Client History

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	Discharge	Discharge Reason: Automatic discharge - Client admitted to another program	Seaton House - Hostel Program		2014/01/21 01:02:05 PM
2014/01/21	Intake	Referred by: Shelter Program	Birchmount Residence		2014/01/21 01:01:14 PM
2014/01/16	Intake		Streets to Homes Assessment and Referral Centre - Service Program		2014/01/16 08:04:30 PM
2014/01/16	Intake		Streets to Homes Assessment and Referral Centre - Service Program		2014/01/16 07:59:40 PM
2014/01/15	Intake		Streets to Homes Assessment and Referral Centre - Service Program		2014/01/15 02:36:33 AM

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.*