

SMIS Role Access Guide

Purpose:

The **SMIS Role Access Guide** was developed to assist Shelter Access Managers (or alternates) to identify the correct role and access level when completing the **SMIS User Access Form** for individual SMIS Users in their Shelter Program.

Important to Note:

Pre-determined SMIS Roles are created to reflect access to particular *functions* in SMIS. The SMIS Roles listed in this document do not necessarily reflect a staff's job description/title in the shelter.

Content:

1. SMIS Functions
2. Access Type
3. Primary and Secondary Roles
4. Role Access
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SMIS is divided into **five** main modules:

- Client Management
- Facility Management
- Program Management
- Reports
- My Tasks

Within these five modules, there are the following SMIS functions:

SMIS Functions:

<u>Client Management</u>	<u>Program Management</u>
Intake	Queue
Admission	Client List
Referral	Incidents
Discharge	Service Restriction List
Service Restriction	Staff List
Complaint	Edit Program
Consent	
Case Management	
Health and Safety	<u>Facility Management</u>
Attachment	Manage Rooms and Beds
Client Tasks	Facility Message
Print Label	
	<u>Reports</u>
Financial: Disbursements	Reports
Eligibility	
Transactions	
Summary/Detail	<u>My Tasks</u>
	Staff Tasks

Access Type:

There are three types of access in SMIS: **Read**, **Write** and **No Access**.

1. **Read** allows a user to read/view the related module, but does not allow a user to write (change data).
2. **Write** allows a user to both read and write in the module.
3. **No Access** prevents a user from accessing the module in SMIS.

SMIS Roles:

SMIS Roles are divided into two categories: **Primary and Secondary**.

SMIS Primary Roles:
1. Admin Worker (AW)
2. Intake Worker (IW)
3. Case Worker (CW)
4. Supervisor (SUP)
5. Manager / Executive Director (MRG)
SMIS Secondary Roles:
A. Case Management (Read Only)
B. Service Restrictions (Write)
C. Incidents (Write)
D. Complaints (Write)
SMIS Financials: Disbursements
E. Eligibility Assessment
F. Transactions

SMIS Primary Roles:

These are the major Roles that logically group various SMIS functions to optimally grant access to a SMIS user in order for them to perform his/her daily work using SMIS. Only *one* Primary Role should be selected.

SMIS Secondary Roles:

In some cases, the Secondary Roles, along with the Primary Roles above, give SMIS Users an ideal combination of access, in order to perform his/her daily work using SMIS. *More than one* Secondary Role can be selected.

SMIS Financials: Overview:

The financial module enables users to issue and track financial processes common in Shelter Programs, such as: 1. Personal Needs Allowance (PNA), 2. Food Allowance (FA) and 3. Client Safekeeping Funds (CSF).

In addition, there are Reports that accompany the financial features, which are (1) PNA to be Paid, (2) Client Safekeeping Balance, (3) Financials Report and (4) Eligibility. The reports will assist Shelter operators with the financial administration in their respective programs.

SMIS Roles are set up in a hierarchy with the **Admin Worker (AW)** having access to very few functions.

The **Intake Worker (IW)** has access to everything that an **AW** has, plus the ability to Write Intake, Admit, Refer and Discharge.

A **Case Worker (CW)** has everything an **IW** has, with the addition of Case Management and writing Complaints.

A **Supervisor Role (SUP)** has everything a **Case Worker (CW)** has, plus the ability to edit rooms and beds in a facility.

The **Manager Role** has **Write** access to some functions, but mainly **Read** access to all functions.

Admin Worker (AW)

The Admin Worker has access to the functions listed below:

Write Access	Read Access cont'd
Reports	Staff List
Client Tasks	Facility Message
Print Label	Staff Tasks
Attachment	
Consent	
Read Access	No Access
Intake	Manage Rooms and Beds
Admission	Incidents
Discharge	Case Management
Queue	
Health and Safety Alert	
Service Restriction	
Service Restriction List	
Client List	

Intake Worker (IW)

The Intake Worker has access to the functions listed below:

Write Access	Read Access
Intake	Service Restriction
Admission	Complaints
Referral	Service Restriction List
Discharge	Staff List
Consent	Health and Safety Alert
Reports	Incident

Client Tasks	Facility Message
Client List	Staff Tasks
Attachment	
Print Label	No Access
Queue	Case Management
	Manage Rooms and Beds

Case Worker (CW)

The Case Worker has access to the functions listed below:

Write Access	Read Access
Intake	Service Restriction
Admission	Service Restriction List
Referral	Staff List
Discharge	Health and Safety Alert
Consent	Facility Message
Reports	Staff Tasks
Client Tasks	
Client List	
Attachment	No Access
Print Label	Manage Rooms and Beds
Complaints	
Case Management	
Incidents	
Queue	

Supervisor (SUP)

The Supervisor has access to the functions listed below:

Write Access	Write Access cont'd
Intake	Service Restriction
Admission	Service Restriction List
Referral	Staff List
Discharge	Health and Safety Alert
Consent	Manage Rooms and Beds
Reports	Facility Message
Client Tasks	Queue
Client List	Staff Tasks
Attachment	
Print Label	
Complaints	
Case Management	

Incidents	
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Manager (MGR)

The Manager has access to the functions listed below:

Write Access	Read Access
Intake	Service Restriction
Case Management	Service Restriction List
Complaints	Staff List
Client Tasks	Client List
Reports	Incidents
Print Label	Queue
Facility Message	Admission
Health and Safety Alert	Consent
Manage Rooms and Beds	Discharge
Staff Tasks	Attachment
	Referral

SMIS Financials: Disbursements:

ELIGIBILITY ASSESSMENT

This function is used to make a client **eligible** for Personal Needs Allowance (PNA) and **ineligible** for Food Allowance (FA).

TRANSACTIONS

This function is used to **issue** Personal Needs, Food Allowance and record Client Safekeeping Funds (CSF) Deposits & Withdraws.

Note *

Users who have access to create Eligibility will not have access to create Transactions.

Contact Information:

If you have any questions regarding this Guide or the SMIS User Access Form, please contact:

smishelp@toronto.ca

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