To Create a New Intake

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Business Purpose:

This New Intake screen will allow you to create a new intake record for the client by first selecting a program. It is recommended you enter as much information as you have available for the client. Mandatory fields are marked with an * and MUST be filled in order to Save the client information.

The mandatory fields are: First name, Last name, Gender, Date of birth, Current sleeping arrangements, Have you stayed in a shelter Before, Reason for Service, at least one Source of Income, Lived the last 12 months, Program and Comment/Details.

How to:

1. If creating a new intake, begin by selecting the program you are intaking the client for.

2. Select the Current Sleeping Arrangement text box and make a selection from the drop-down.

3. Select the Have you stayed in a Shelter before? text box and select Yes or No.

4. Select the Reason for Service textbox and make a selection from the drop-down list.

5. Select at least one Source of Income using the checkboxes provided.

6. Select the Lived the last 12 months text box and select from the drop-down list.

7. If program is not already selected, then select the Program text box and select a bedded program from the available Program options.

8. Select the Comments/Details textbox to enter notes about the client.

9. Enter or update any other information in all non-mandatory fields in the **Referred by**, **Other information**, **Presenting issues** and **Identification** tabs on the screen as necessary. Whenever available, use the drop-down arrow next to the field for selection. For fields with long lists (i.e. Language and Country of origin), click on the icon to select from a list of values.

10. Select the **Save** action button to save the information entered on the new intake form.

Important Notes:

1. A Gender warning ⚠ Gender conflict with selected program. ☐ Intake Anyway   will appear if a Male client has an Intake into a

   Female program and vice versa. Transgender clients can go in all programs. To proceed, check off Intake Anyway then Save.

2. An Age Conflict warning ⚠ Age conflict with selected program. ☐ Save Changes Anyway   will appear if the age of the client does not correspond with the selected program. For instance, if a Youth has an Intake into an Adult program or vice versa. To proceed, check off Intake Anyway then Save.

3. Note that you cannot revise the program from one type to another (e.g. from a service Program to a bed Program) after creation of the Intake. You must do a new intake in order to switch a client to another type of Program.

4. There may be times where a client can provide additional information they have not already provided to you. An update can occur at any time for a client with an active intake within the Client Management module. Once the initial client information has been captured and saved within SMIS, you will simply need to find the client once again via a client search, and select the Intake option within the Navigator to view or perform updates in the intake page.

5. Information for all 3 fields listed below the OW/ODSP Status tab will automatically be populated within 24 hours after an intake has been saved within SMIS.

6. Once an intake for a bed program has been saved, you will be given new options such as: Begin a Family intake (for family shelters) or simply admit the single client to your bed program by clicking the Admission action button.

7. The Admission action option is not available when processing an intake for a service program. The term "admitted" in SMIS refers to placing a client in a bed.

8. If a new intake is initiated into a program to which a client has already had an intake, the new intake will retrieve most of the data from the previous intake (with the exception of mandatory fields) and present it on the screen. Your most recent

intake within the previous 90 days is used. If an intake was not completed for that client and that program in the last 90 days then a blank intake is shown.