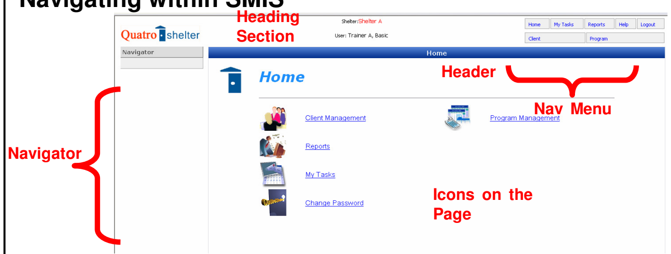
Client Management – Quick Reference

Logging into SMIS
1. You will be provided with your own username and password
2. Enter your username into the User ID field and your password into the Password field.
3. Select Login.

Note: The multiple shelter selection option only appears for users having access to more than one shelter. For all others users, SMIS will direct you to your Home page.

Navigating within SMIS


Client Management
The Client Management module provides the tools necessary to manage a client's information.

Searching for a Client
1. Select Client Management on your Home page.
2. Enter 2-4 characters of the first and last name or the Client I.D.
3. Select Search.

Creating a New Client (only after a SEARCH is performed)
1. Select Client Management on your Home page or Client in the Nav Menu.
2. After SEARCHING, Select New Client.
3. The Client Management Add/Edit Intake page will be displayed for you to process an intake for a new client.
4. Complete all the mandatory fields marked with an asterisk (*).
5. Enter any additional information.
6. Select Save and Close.

Working with a New Intake
Options available once an Intake to a Bed Program has been saved.

Options available once an Intake to a Service Program has been saved.

Updating Client Information
1. Search and select your client.
2. Select Intake in the Navigator.
3. Select Update under the Actions column. Add information.
4. Select Save and Close

Creating a New Admission To a Bed Program
1. Select Client Management on your Home page or Client in the Nav Menu.
2. Search and select your client.
3. Select Intake in the Navigator.
4. Select Update to view the Client Management Add/Edit Intake.
5. Select Admission.
6. Select the arrow next to Assign Room and select a room from the list.
7. Select the arrow next to Assign Bed and select a bed from the list.
8. Select Sign located at the bottom of the Admission page.
9. Ask the client to sign his/her name on the signature pad
10. Select Save Signature.
11. Select OK to close the saved signature.
12. Select the red X at the top of the Signature pad popup.
13. Select Save and Close.

Referring a Client to Another Program
1. Select Client Management on your Home page or Client in the Nav Menu.
2. Search and select your client, ensure that the client has an active intake.
3. Select Referral in the Navigator.
4. Select New Referral.
5. Select Search. A popup will display with a Program Search list.
6. Select a program from the list. The name of the program selected will automatically be populated in the name field. Bed or Service will be displayed in the Type box, and numbers will be displayed in the Occupancy/Queue field. The phone number of the program selected will be displayed in the Phone field.
7. Enter Reason for Referral.
8. Enter additional notes in Notes.
9. Select the arrow next to the From Program. Select the program name that you are currently working in.
10. Select Save and Close

Discharging your Client
1. Select Client Management on your Home page or Client in the Nav Menu.
2. Search and select your client.
3. Select Discharge in the Navigator
4. Select Discharge under the Actions column.
5. Select the arrow next to the Discharge Disposition and select the appropriate disposition.
6. Select the arrow next to the Discharge Reason and select the appropriate reason.
7. Select the arrow next to the Transportation Type Provided and select the appropriate option.
8. Enter any necessary notes in the Discharge Notes field.
9. Select Save and Close.

Creating a Family Intake
The Family Intake process starts by processing an individual intake for the head of the family. After saving the Family head's intake:
1. Select Family Intake.
2. Select Add Dependent to add a spouse or a dependent.
3. Select Add Dependent for each additional family member you need to add
4. Select Save & Close the Family Intake form.

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Creating a New Admission To a Bed Program for Your Family

1. Select Client Management on your Home page or Client in the Nav Menu.
2. Search and select the Family head.
3. Select Intake in the Navigator.
4. Select Update to view the Client Management Add/Edit Intake.
5. Select Admission.
6. Select the arrow next to the Assign Room and select a room from the list.
7. Select Save and Close.

Discharging the Entire Family

1. Search and select your client. **THIS MUST BE THE FAMILY HEAD**.
2. Select Discharge in the Navigator.
3. Select Discharge in the Action column.

Discharging a Family member other than the Family Head

1. Search and select your client. **THIS MUST BE THE FAMILY HEAD**.
2. Select Remove Dependent for the member you want to discharge
3. Search and select the Family member that was removed
4. Select Discharge in the Navigator.
5. Select Discharge in the Action column.

Viewing your Program Queue

1. Select Program Management on your Home Page or Select Program in the Nav Menu.
2. Select the appropriate program.
3. Select Queue in the Navigator.
4. Select Home on the Nav Menu to return to your Home page.

Intake, Admit or Reject Clients from the Program Queue

1. Select Program and then find the appropriate program.
2. Select Queue in the Navigator.
3. Select Intake next to your client's name, which allows you to complete an intake.
4. You may also have another client listed with the word Admit next to their name.
5. To admit your client, Select Admit.
6. On occasion you may need to reject the client.
7. Select Reject next to your client's name. Select the Rejection Reason and enter Notes.
8. Select Save and Close.

Printing a Bed Log

1. Select Program Management on your Home Page or Select Program in the Nav Menu.
2. Select the appropriate program.
3. Select Clients in the Navigator.
4. Select Print to display the popup asking you if you would like to open or save this file.
5. Select Open.
6. Select the printer icon to print the Bed Log.
7. Select OK to print the Bed Log.
8. Select the red X at the top of the popup.
9. Return Back to the Programs.

Creating a Client Consent Form

1. Search and select your client, ensure that the client has an active intake.
2. Select Consent in the Navigator.
3. Select New Consent.
4. Enter the necessary information and Select Save.
5. Select Sign to display the signature popup window.
6. Have the client sign the digital signature pad.
7. Select Save Signature on the Signature popup.
8. Select OK to close the saved signature popup.
9. Select Save and Close.

Entering a Client Complaint

1. Search and Select your client.
2. Select Complaint in the Navigator.
3. Select New Complaint.
4. Select the appropriate Source and Method of Contact.
5. Enter the Complainants' First Name and Last Name.
6. Select the appropriate Program from the drop down box.
7. Select on the check box next to Is Complaint Related to Toronto Shelter Standards and select the appropriate options, and enter the required information for: Description of Complaint/Narrative; Was the Complainant Satisfied with the Outcome; and Time Spent on Complaint.
8. Select Save and Close.

Reporting a Client Incident

1. Select the Program Management icon on your Home Page or Select Program in the Nav Menu.
2. Select the appropriate program.
3. Select Incidents in the Navigator.
4. Select New Incident.
5. Enter all appropriate information.
6. Select Save and Close.

Uploading any Attachments into SMIS

1. Search and select your client
2. Select Attachment in the Navigator.
3. Select Add. The Client Management Attachment Edit page will be displayed.
4. Select the appropriate Document Category.
5. Select Browse. Find your file and Select Open to open the file. The names of the files available will be displayed in the popup window.
6. Select Upload and then Close. The file you downloaded will be saved into the System.
7. Select Close.

Using SMIS Help Area

1. Select Help in the Nav Menu.
2. Select Index options at the top left of your screen.
3. Enter the topics you are searching for below the words "Type in the keyword to find:"
4. Select enter on your keyboard to perform your search
5. Alternatively, select any topics listed at the left hand side of your screen to view information on that topic.
6. Select the red X in the top right had corner to close the Help window.

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