



SMIS Release Notes

Version 3.4
December, 2017

This SMIS enhancement (December 2017) release version 3.4 addresses the highest priority change requests and bug fixes.

There are a total of 3 major groups of enhancements and 3 bug fix items in this release, of which all will be apparent to end users. All 3 groups and 3 bug fix 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>



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Enhancements:

1. Service Demand Enhancements
2. Leave With Permission Enhancements
3. Mobile Outreach Module

Bug Fixes:

4. Issue with Case Note Rights
5. Allow for Read-Only Access to Case Notes from De-Activated Programs
6. Intake Data Review

1. Service Demand Enhancements

To better serve our clients, the SMIS Service Demand enhancement allows for:

- ✓ Better tracking and monitoring of client service demands by measuring:
 - Client wait times (from service program intake to referral, or bed program intake to bed hold)
 - Held bed times (from bed hold to admission/expiry)
 - Client travel times (referral to accept at destination program)
- ✓ Insight into client no shows and bed utilization

With this enhancement, three SMIS screens are being modified:

1. **Service Queue** screen with a new context-sensitive **Action** dropdown based upon the client service demand status
2. **Refer To Bed** screen with new "Decline" and "Refer" **Action** buttons
3. **Queue History** screen showing the last 24 hours of resolved service demands

Also included is a color-coded queue system to assist staff with determining priorities:

- **Red** - alerts staff to clients whose wait times for referrals is greater than 2 hours
- **Yellow** - cautions staff about clients whose wait times for referrals is between 1-2 hours
- **White** - indicates to staff the clients whose wait times for referrals are less than 1 hour
- **Green** - indicates to staff any potential available bed vacancies in appropriate sectors

All SMIS users will benefit from this enhancement.

Service Demand Workflow

The new **Service Demand workflow** (see *Diagram 1 on next page*) has the following Steps:

*[All figures refer to after each workflow are in the **Sample Screen and Walkthrough** section, in the SMIS v3.4 Service Demand User Guide*]*

1. Client Intake *[see Figure 1 in User Guide*]*
2. Client Requests Bed (waiting for Referral) *[see Figures 1 & 2 in User Guide*]*
3. Offered and Declined *[see Figure 3 in User Guide*]*
or
Client Referral *[see Figure 4-6 in User Guide*]*
or
Local Admission (if Bed Program) *[see Figures 19-21 in User Guide*]*
or
Client Withdrawn *[see Figures 16 & 17 in User Guide*]*
or
No Bed Offered (to Overflow or Staff Closeout) *[see Figures 16 & 18 in User Guide*]*
4. Hold Bed *[see Figures 7 & 8 in User Guide*]*
5. Accept (Intake at destination Program) *[see Figures 9-13 in User Guide*]*
or
Rejected *[see Figure 14 & 15 in User Guide*]*

or
6. Client No Show

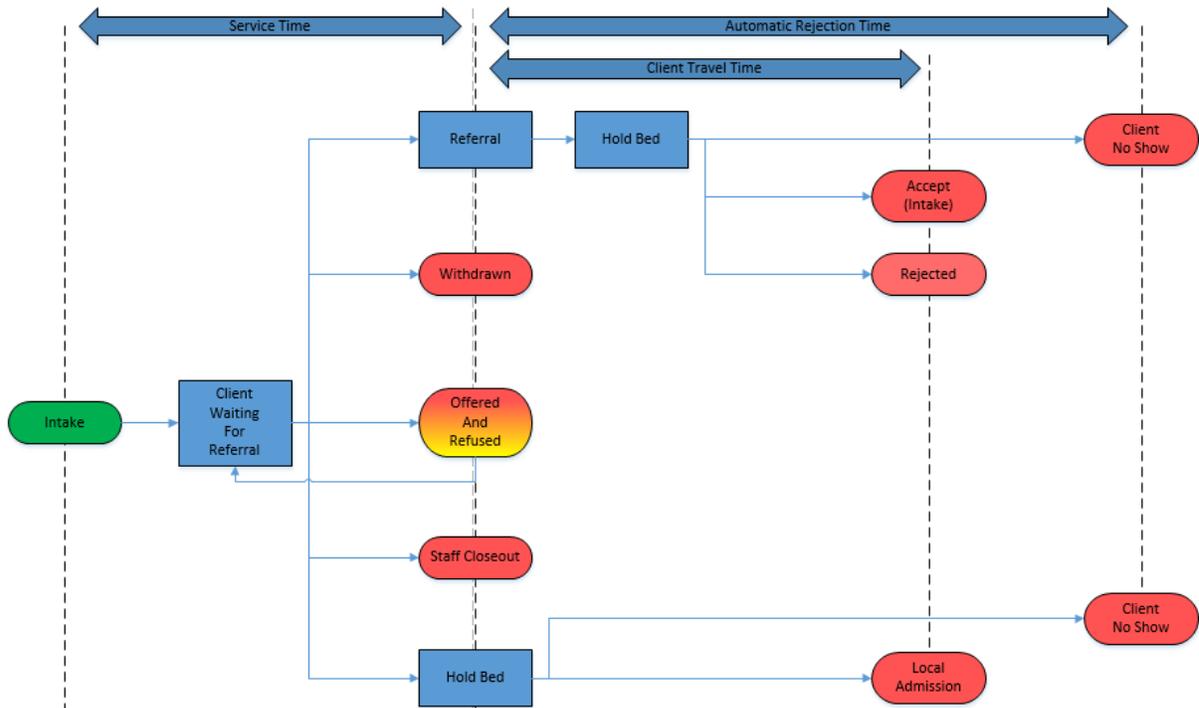


Diagram 1: Service Demand Workflow



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Sample Screens and Walkthrough

Refer to the "SMIS v3.4 Service Demand Enhancement – User Guide"* for sample screenshots of a client referral from a (source) program to a (destination) bed program.

*SMIS v3.4 Service Demand Enhancement – User Guide can be found at:

<http://www.toronto.ca/housing/smis/smisuser.htm>

2. Leave With Permission Enhancement

This enhancement is for the capturing of a client's current and/or history of Leave With Permissions (LWP).

At any time, there can only be ONE active LWP record per client member.

LWP is for a client member, from one particular program, for a selected reason from a dropdown, must have a start date-time and a schedule end date-time, plus optional comments.

LWP can be terminated early (immediately) before the scheduled end date-time with mandatory expire early comments added.

A new option named "[Leave with Permission](#)" has been added to the Client **Navigator**:



Client Management - Summary

Client No. [redacted]
Name [redacted] **DOB** 1960/03/03 **Age** 57
[Back to Client Search](#) [Help](#)

Personal Information

Client No	15874	Active	Yes
First Name	Ryan	Gender	Male
Last Name	Nunley	Date of Birth	1960/03/03
Alias	ttt		
Health and Safety	None found New Health and Safety		

Family

No family member exists.

Bed/Room

Assigned Room:	House
Assigned Bed:	3

Below is a client's **Leave With Permission** detail screen:



Shelter:
User: J, Linda

Client Management - Leave With Permission

Client No.		DOB	1960/03/03
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✖ Close | 💾 Save

As per the Hostel standards, Leaves with permission cannot be longer than 96 hours

Leave With Permission

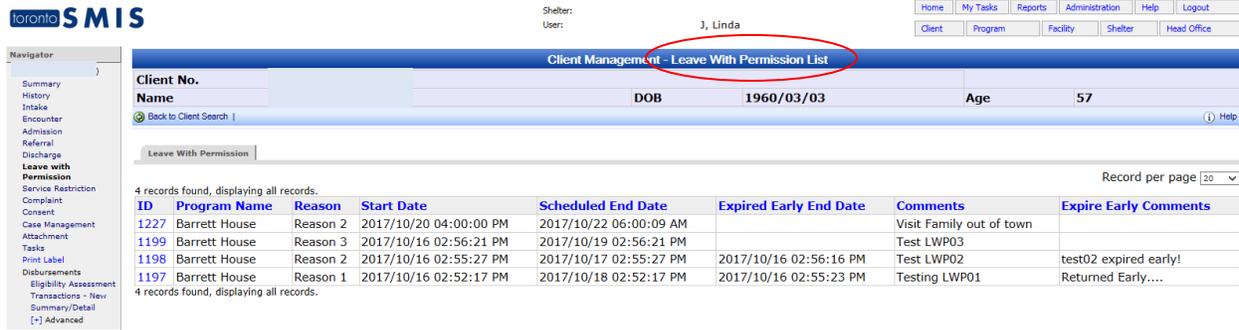
Program	Barrett House
Reason*	Reason 2 ▼
Start Date*	2017/10/20 04:00:00 PM 🗓
Scheduled End Date*	2017/10/22 06:00:09 AM 🗓
Comments	Visit Family out of town

Expire Early

Expired Early End Date	2017/10/19 04:27:58 PM 🗓
Expire Early Comments	

Expire Early

Below is the **Leave With Permission List** screen:



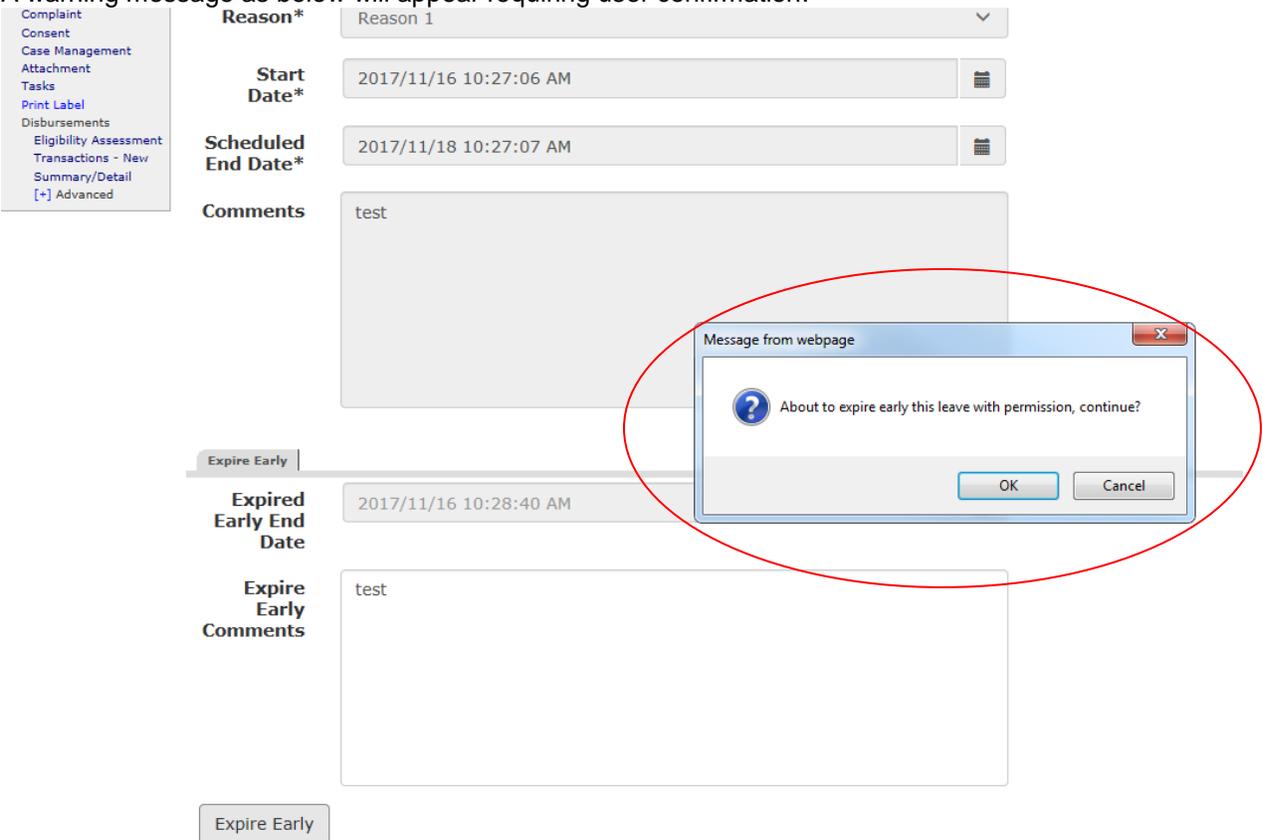
Client Management - Leave With Permission List

Client No. [redacted]
 Name [redacted] DOB 1960/03/03 Age 57

4 records found, displaying all records.

ID	Program Name	Reason	Start Date	Scheduled End Date	Expired Early End Date	Comments	Expire Early Comments
1227	Barrett House	Reason 2	2017/10/20 04:00:00 PM	2017/10/22 06:00:09 AM		Visit Family out of town	
1199	Barrett House	Reason 3	2017/10/16 02:56:21 PM	2017/10/19 02:56:21 PM		Test LWP03	
1198	Barrett House	Reason 2	2017/10/16 02:55:27 PM	2017/10/17 02:55:27 PM	2017/10/16 02:56:16 PM	Test LWP02	test02 expired early!
1197	Barrett House	Reason 1	2017/10/16 02:52:17 PM	2017/10/18 02:52:17 PM	2017/10/16 02:55:23 PM	Testing LWP01	Returned Early....

To expire the LWP early, Expire Early Comments must be entered and the Expire Early button pressed. A warning message as below will appear requiring user confirmation.



Reason* Reason 1

Start Date* 2017/11/16 10:27:06 AM

Scheduled End Date* 2017/11/18 10:27:07 AM

Comments test

Expire Early

Expired Early End Date 2017/11/16 10:28:40 AM

Expire Early Comments test

Expire Early

Message from webpage

About to expire early this leave with permission, continue?

OK Cancel

After saving the early expired LWP, the Expired Early End Date and Comments will appear in the LWP List record as shown below:



Client Management - Leave With Permission List

Client No. [redacted]
 Name [redacted] DOB 1972/08/03 Age 45

Back to Client Search | New Leave With Permission

Saved Successfully!

Leave With Permission

Record per page 20

ID	Program Name	Reason	Start Date	Scheduled End Date	Expired Early End Date	Comments	Expire Early Comments
1360	Birkdale Residence - Bedded Program	Reason 1	2017/11/16 10:27:06 AM	2017/11/18 10:27:07 AM	2017/11/16 10:30:16 AM	test	test

One record found.

All SMIS users will notice this change.

3. Mobile Outreach Module

A new Mobile Outreach App has been created for capturing Outreach Encounter information into SMIS. It includes Client Search, Health Assessment, Cold Assessment, Encounter Questionnaire, Emergency Encounter, Encampments and Pets information.

As part of this enhancement App, a new SMIS Client Management – Encounter screen has been created, the included fields are:

- Encounter Date
- Staff
- Update Date



The screenshot shows the SMIS interface for the 'Client Management - Encounter' screen. At the top, there is a navigation bar with 'Home', 'My Tasks', 'Reports', 'Administration', 'Help', and 'Logout'. Below this, the user is identified as 'Shelter: J, Linda' and 'User: J, Linda'. A secondary navigation bar includes 'Client', 'Program', 'Facility', 'Shelter', and 'Head Office'. On the left, a 'Navigator' menu lists various functions like 'summary', 'History', 'Intake', 'Encounter', 'Admission', etc. The main content area displays a table for 'Encounter History' with one record found. The record details include 'Encounter Date' (2017/10/03 08:54 AM, 2 reviews), 'Staff', and 'Update Date' (2017/10/03 08:54:34 AM).

Client No.	Name	DOB	Age
		1966/01/08	51

Encounter Date	Staff	Update Date
2017/10/03 08:54 AM (Reviews: 2)		2017/10/03 08:54:34 AM

And an individual Encounter History screen containing the following fields:

- Status
- Type
- Date
- Client Present?
- Notes

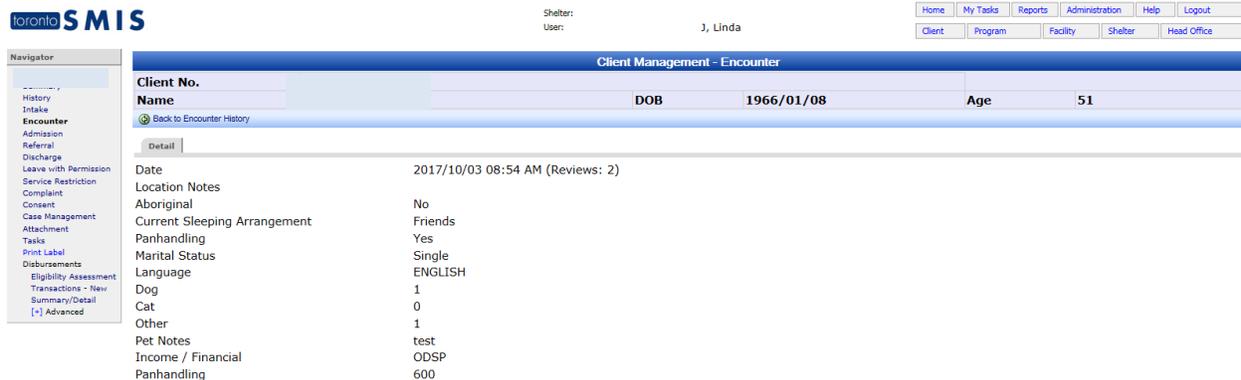


The screenshot shows the 'Client Management - Encounter' interface. At the top, it displays 'Client No.' and a 'Back to Encounters' link. Below this is a table with columns for Name, DOB, and Age. The main section is a table with columns for Status, Type, Date, Client Present, and Notes. The table contains two rows of encounter data.

Status	Type	Date	Client Present	Notes
Closed	Transport Assessment	2017/10/03 01:40 PM	No	test
S2H Transporting	Initial Assessment	2017/10/03 08:54 AM	Yes	test

And beneath each Encounter History record, are the details of that particular Encounter with the following fields of collected data:

- Date
- Status
- Location Notes
- Current Sleeping Arrangement
- Are you working with anyone to secure housing?
- Do you want assistance to secure housing?
- Aboriginal Status
- Marital Status
- Language
- Number of Dog(s)
- Number of Cat(s)
- Number of Other Pets
- Pet Notes
- Income / Financial Notes
- Panhandling



Client Management - Encounter

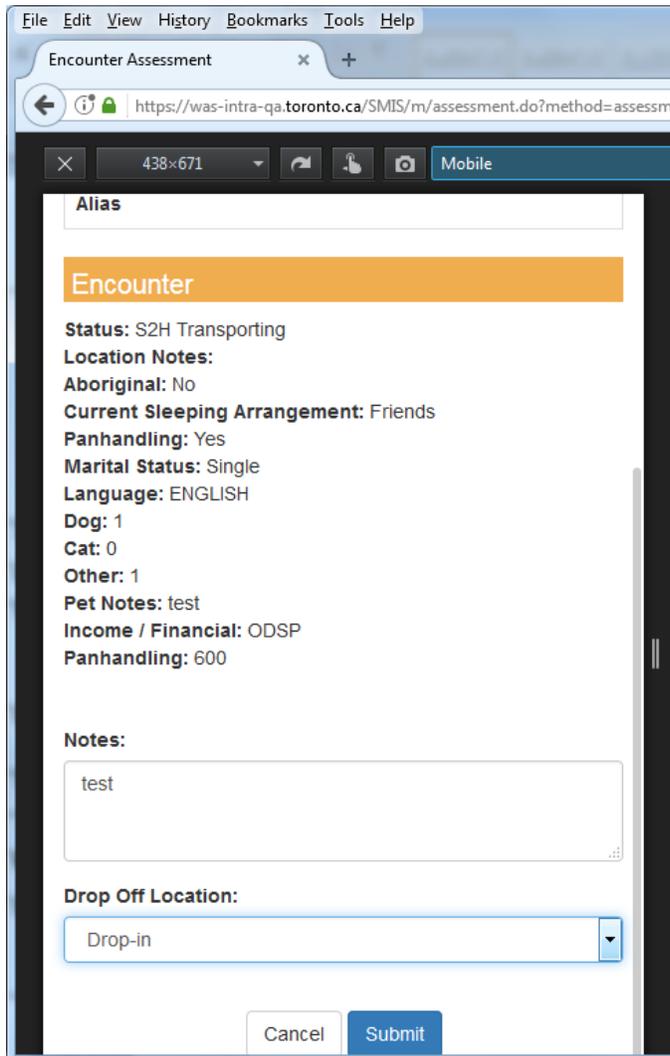
Client No.	Name	DOB	Age
	J, Linda	1966/01/08	51

Back to Encounter History

Detail

Date	2017/10/03 08:54 AM (Reviews: 2)
Location Notes	
Aboriginal	No
Current Sleeping Arrangement	Friends
Panhandling	Yes
Marital Status	Single
Language	ENGLISH
Dog	1
Cat	0
Other	1
Pet Notes	test
Income / Financial	ODSP
Panhandling	600

A Sample Encounter Assessment screen on a mobile device is shown below:



File Edit View History Bookmarks Tools Help

Encounter Assessment

https://was-intra-qa.toronto.ca/SMIS/m/assessment.do?method=assessme

438x671 Mobile

Alias

Encounter

Status: S2H Transporting

Location Notes:

Aboriginal: No

Current Sleeping Arrangement: Friends

Panhandling: Yes

Marital Status: Single

Language: ENGLISH

Dog: 1

Cat: 0

Other: 1

Pet Notes: test

Income / Financial: ODSP

Panhandling: 600

Notes:

test

Drop Off Location:

Drop-in

Cancel Submit

All SMIS users will notice this change.

4. Issue with Case Note Rights

Previously, when a user has different Case Notes rights on different Programs in a Facility, the New Case Notes button was missing. This has now been corrected.

All SMIS users who had issues with Case Notes access will notice this change.

5. Allow for Read-Only Access to Case Notes from De-Activated Programs

Previously, when a Program was de-activated, its case notes were no longer accessible. Now, these case notes will be available with read-only access if a staff has case notes access rights in that Program.

All SMIS Users with Case Notes access will notice this change.

6. Intake Data Review

Previously, during creation of a Family, NOT all mandatory fields were copied over from the head of a family to the other members. Now, all mandatory fields will be copied over, including for Service Programs, the Service End Date selection.

The fields that are now copied over from head of a family to the members that were not previously copied are:

- Stayed in shelter before
- Reason for service
- Source of income
- Comments
- Service End Date or Expiry selection for Service Programs Only.

All SMIS Users working with families will notice this change.