toronto **SMIS** Shelter Management

Information System

Version 3.4 Release

Service Demand Enhancement User Guide

Version 1.1

December 1, 2017





#### **Introduction**

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]

- 1. Client Intake [see Figure 1 below]
- 2. Client Requests Bed (waiting for Referral) [see Figures 1 & 2 below]
- 3. Offered and Declined [see Figure 3 below ]

  or
  Client Referral [see Figure 4-6 below ]
  or

  Local Admission (if Bed Program) [see Figures 19-21 below ]

  or
  Client Withdrawn [see Figures 16 & 17 below ]
  or

  No Bed Offered (to Overflow or Staff Closeout) [see Figures 16 & 18 below ]
- 4. Hold Bed [see Figures 7 & 8 below ]
- Accept (Intake at destination Program) [see Figures 9-13 below ] or Rejected [see Figure 14 & 15 below ]

or

6. Client No Show











# Sample Screens and Walkthrough

Following are sample screenshots of a singles client referral from a (source) program to a (destination) bed program. If the source program is a service program, then there will be a <sup>B Request Bed</sup> button on a new intake screen. This button is clicked when the Client is requesting a room/bed. However, if the source program is a bed program, then by default a bed request is automatically generated when an intake is created.

(Refer also to the <u>Service Demand Workflow</u> section above to see where the Figures below would appear within the workflow.)





Figure 1: The staff initiating a referral from a service program (e.g. SHARC, Central Intake, Drop-Ins) will create a new Intake, then click the <sup>SRequest Bed</sup> button if a bed is being requested. For bed programs, the bed request is generated when an intake is created and no <sup>Request Bed</sup> button is visible.

	toronto SMI	S T1P1 An extreme cold alert Standards, Shelters are exp criteria, and extend hours of Shelters will be notified when	is in effect. As bected to relax of operation to a en the extreme	per the Toronto Shelter admissions and discharge allow clients to stay indoors. cold alert has been terminated.	Shelter: User:	,נננננ	Linda	Home	My Tasks Program	Reports Faci	Administration lity Shelte	Help r He	Logout ad Office
	ted. For more information pl	lease contact the Streets to Homes A	Assessment and	Referral Centre at (416) 338-4994		F1P4 An extreme colo	d alert is in effect. As per the Toronto S	helter Standards,	Shelters are	expected to	relax admissio	ns and dis	charge criteri
	Navigator				Clie	nt Management	- Add/Edit Intake						
	Chan, John(499202) Summary	Client No.	499202										
	History	Name	Chan, Jo	hn		DOB	1960/01/01		Age		57		
	Intake Encounter	🔀 Close   🔒 Save 🗐 Request Be	ed 19 Family Inta	ke									(j) Help
Admission Referral Discharge		(i) Saved Successfully!											
Referral Discharge Leave with i	Discharge	Personal information											
	Leave with Permission Service Restriction	First name*	loho			1:	ast name*	Chap					
Service Restriction Complaint Consent Case Management		Gender*	Male	✓			ate of birth*	1960/01/01					
		ochider				0	/yyy/mm/dd)	1900/01/01					
Case Man Attachme	Attachment	Alias	JC					(existing clier	nt)				
itake )—	Print Label	Referred by											
	Disbursements Eligibility Assessment	Referred by		~									
	Transactions - New Summary/Detail	Contact name											
	[+] Advanced	Contact number											
		Contact email											
		Other information											
		Language				AN							
		Aboriginal		✓			Aboriginal other						
		VAW		✓									
		Current sleeping arranger	ments*	Abandoned Building 💙									
		Have you stayed in a shel	ter before?*	Yes 🗸									
		Reason for homelessness			~		Length of homelessness			~			
		Reason for Service*		Eviction Due to Rental Arrears	~								
		Presenting issues											
		Disability				] D	isclosed substance use						





Figure 2: The new **Service Queue** screen of the source program is shown. **Beds** are **available** for the 4<sup>th</sup> client in the **C**o-ed and **M**ens sectors, highlighted in green, and available **Actions** include "Refer to Bed" and "Closeout". The top 3 clients have exceeded the 2 hours wait time for a referral and are highlighted in red.

		File Edit View Favori	tes Tools Help Page Safety Tools ( information please co Centre at (416) 338- extreme cold alert is in effect. A	<b>2</b> ▼ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥ ♥	mes Assessment and er Standards, Shelters	Referral Shelter: Home My Task User: JJJJJJ, Linda Client Progr are expected to relax admissions and discharge criteria, and extend hours of operation to allow clients to stay indoors.	a Reports Administration and Facility Shelter Shelters will be notified when th	Help Logout Head Office				
	Client	Navigator Streets to Homes Assessment and Referral Centre - Service Program(11796) General Queue	Back to Programs     Service Queue	-11 (beau	Program	Management - Streets to Homes Assessment and Referral Centre - Service Program	Last Updated : 2017/11	E 1/09 01:52:47 P				
-	Waiting	Service Queue Queue History	11 items found, displaying Name	all items. Requested Bed	Waiting	Client Status	Beds Available	Action				
	For	Incidents	Alamillo, Perry	11:14 AM	170:38	Waiting	Y	Select action 🗸				
	Deferral	Service Restrictions	nnm, nnm	01:26 PM	72:26	Waiting [5]	C,M	Select action V				
	Referral	Staff	joe, joe	03:40 PM	46:12	Waiting	C.M	Select action X				
	*	Dashboard	Chan, John	01:52 PM	00:00	Waiting	С,М	Select action				
		Statistics Occupancy Occupancy - Unique	Statistics Occupancy Occupancy - Unique	Smullen, Wayne	08:42 AM	1087d 5h 10m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Closeout			
ł				Occupancy Occupancy - Unique Clients	Occupancy Occupancy - Unique Clients	Occupancy Occupancy - Unique Clients	Occupancy Occupancy - Unique Clients	Occupancy Occupancy - Unique Clients	Winson, Elli	07:35 PM	973d 18h 16m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program
		Client Services	Berenbaum, Mireille	01:59 PM	944d 23h 53m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action V				
		Client Services - Unique Clients	Cleckner, Ivory	04:11 PM	718d 21h 40m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action 🗸				
		Discharge	Shasteen, Zandra	12:39 PM	526d 1h 13m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action 🗸				
		Discharge - Unique Clients	Mulvehill, Nam	05:14 PM	385d 20h 38m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action 🗸				
		Reports	Topor, Virgie	10:03 AM	357d 3h 48m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action 🗸				
		Client Report	11 items found, displaying	all items.								

In the **Beds Available** column above, Client Sectors are shown with green background when they have vacancies. The Sectors are:

- 1. Y = Youth
- 2. C = Co-ed
- 3. M = Men
- 4. W = Women
- 5. F = Family





Figure 3: After selecting the "Refer to Bed" **Action**, the new **Refer To Bed** screen will appear. All declined offers should be recorded and will be counted in the **Decline** column.

Note that you can decline the same program multiple times, and refer to a previously declined program.

toronto SM	Shelters will be not For more information Referral Centre at (	ified when the extreme cold alert has been terminated. Sh on please contact the Streets to Homes Assessment and Us (416) 338-4994	elter: er:	נננג, Linda	a		d	lient Program	Facility	Shelter	Н
in effect. As per the Toro	onto Shelter Standards, Shelte	ers are expected to relax admissions and discharge criteria, and exte	end hours of operation to	o allow clients	to stay ind	oors. Shelters will b	e notified wher	n the extreme col	d alert has been t	erminated. For i	more
Navigator			Client Manag	ement - Re	efer To B	ed					
Streets to Homes Assessment and Referral	Client No.	499202									
Centre - Service Program(11796)	Name	Chan, John	DOB		1960	)/01/01		Age	5	57	
General Queue	Close										
Service Queue											
Clients	Filter										_
Incidents Service Restrictions	□ Include program	with no vacancy									
Complaints	Include all progra	am	6								
Dashboard	Apply Filter			$\mathbf{N}$							
Statistics Occupancy Occupancy - Unique	Refer To Bed										
Clients Client Services	Name		Action	<u> </u>	Acc	Occupancy	Queue	Capacity	Vacancy	On Hold	
Charle Dervices			i cuon					• •	•		
Client Services - Unique Clients	Barrett House		Decline	Refer	Beds	3	0	5	2	0	1
Client Services - Unique Clients Discharge	Barrett House Birchmount Resider	nce	Decline	Refer Refer	Beds Beds	3 56	0	5 70	2 4	0 3	1
Client Services - Unique Clients Discharge Discharge - Unique Clients	Barrett House Birchmount Resider Christie Ossington I	nce Men's Hostel	Decline Decline	Refer Refer Refer	Beds Beds Beds	3 56 54	0 5 4	5 70 63	2 4 8	0 3 1	I
Client Services - Unique Clients Discharge Discharge - Unique Clients Reports	Barrett House Birchmount Resider Christie Ossington I Cornerstone Place	nce Men's Hostel	Decline Decline Decline Decline	Refer Refer Refer Refer	Beds Beds Beds Beds	3 56 54 60	0 5 4 0	5 70 63 80	2 4 8 4	0 3 1 5	
Client Services - Unique Clients Discharge Discharge - Unique Clients Reports Client Report Client Intake Report	Barrett House Birchmount Resider Christie Ossington I Cornerstone Place Downsview Dells Be	nce Men's Hostel edded Program	Decline Decline Decline Decline Decline	Refer Refer Refer Refer Refer	Beds Beds Beds Beds Beds	3 56 54 60 26	0 5 4 0 0	5 70 63 80 28	2 4 8 4 1	0 3 1 5 2	
Client Services Unique Clients Discharge Unique Clients Reports Client Report Client Intake Report Client Occupancy Report	Barrett House Birchmount Resider Christie Ossington I Cornerstone Place Downsview Dells Be Downsview Dells: S	nce Men's Hostel edded Program ipecial Circumstance Program	Decline Decline Decline Decline Decline Decline Decline Decline	Refer Refer Refer Refer Refer Refer	Beds Beds Beds Beds Beds Beds	3 56 54 60 26 0	0 5 4 0 0 0 0	5 70 63 80 28 2	2 4 8 4 1 2	0 3 1 5 2 0	
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Client Services - Unique Clients Discharge - Unique Clients Client Intake Report Client Intake Report Client Occupancy Report Client Discharge Report Occupancy Report	Barrett House Birchmount Resider Christie Ossington I Cornerstone Place Downsview Dells Be Downsview Dells: S Family Residence - Fort York Extreme M	nce Men's Hostel edded Program Special Circumstance Program Co-Ed Weather Program	Decline Decline Decline Decline Decline Decline Decline	Refer Refer Refer Refer Refer Refer Refer Refer	Beds Beds Beds Beds Beds Beds Beds Beds	3 56 54 60 26 0 11 13	0 5 4 0 0 0 0 1 0	5 70 63 80 28 2 2 40 19	2 4 8 4 1 2 7 5	0 3 1 5 2 0 0 1	
Client Services - Unique Clients Discharge Discharge - Unique Clients Client Araport Client Intake Report Client Discharge Report Client Discharge Report Service Restruction Report	Barrett House Birchmount Resider Christie Ossington I Cornerstone Place Downsview Dells & Downsview Dells: S Family Residence - Fort Jork Extreme V Fort York SRO Units	nce Men's Hostel Special Circumstance Program Co-Ed Weather Program s Program	Decline Decline Decline Decline Decline Decline Decline Decline Decline	Refer Refer Refer Refer Refer Refer Refer Refer Refer	Beds Beds Beds Beds Beds Beds Beds Beds	3 56 54 60 26 0 11 13 23	0 5 4 0 0 0 1 0 0 1 0 0	5 70 63 80 28 2 40 19 24	2 4 8 4 1 2 7 5 1	0 3 1 5 2 0 0 0 1 0	
Client Services - Unique Clients Discharge - Unique Clients Client Report Client Intake Report Client Occupancy Report Client Discharge Service Restruction Report Service Restruction Report (= ] Financial	Barrett House Birchmount Resider Christie Ossington I Cornerstone Place Downsview Dells B Downsview Dells: S Family Residence - Fort York Extreme I Fort York Extreme I Fort York SRO Units Fred Victor Bethleh	nce Men's Hostel edded Program Go-Ed Weather Program s Program em United Special Circumstance Program	Decline Decline Decline Decline Decline Decline Decline Decline Decline Decline	Refer	Beds Beds Beds Beds Beds Beds Beds Beds	3 56 54 60 26 0 11 13 23 1	0 5 4 0 0 0 1 0 0 0 0 0 0	5 70 63 28 2 40 19 24 3	2 4 8 4 1 2 7 5 1 2	0 3 1 5 2 0 0 1 0 1 0 0	
Client Services - Unique Clients Discharge - Unique Clients Client Report Client Intake Report Client Occupancy Report Client Discharge Report Service Restriction Report Service Restriction Report (+) Financial	Barrett House Birchmount Resider Christie Ossington I Cornerstone Place Downsview Dells & Downsview Dells: S Family Residence - Fort York SRO Units Fort York SRO Units Fred Victor Bethleh Heyworth House Sp	nce Men's Hostel special Circumstance Program Co-Ed Weather Program s Program em United Special Circumstance Program becial Circumstance Program	Decline Decline Decline Decline Decline Decline Decline Decline Decline Decline Decline Decline	Refer	Beds Beds Beds Beds Beds Beds Beds Beds	3 56 54 60 26 0 11 13 23 1 0	0 5 4 0 0 0 1 0 0 0 0 0 0 0 0	5 70 63 28 2 40 19 24 3 2	2 4 8 4 1 2 7 5 1 2 2	0 3 1 5 2 0 0 1 0 0 0 0 0	
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Step 4: When the client accepts a bed offer for a referral, the **Referral** detail screen will appear and the referral record is completed and saved. Remember to enter the contacted staff name of the destination program into the Notes field.

	toronto S M I	Standards, Sneiters are expected to and extend hours of operation to al be notified when the extreme cold information please contact the Stre context (AIC) and Add t. As per the Toronto Shelter Standards, Shel	o relax admissions and discnarge criteria, low clients to stay indoors. Shelters will alert has been terminated. For more ets to Homes Assessment and Referral ters are expected to relax admissions and dis	Shelter: User: JJJJJJ, L charge criteria, and extend hours of ope	Linda ration to allow clients to stay indoors.	Home My Tasks Repr Client Program Shelters will be notified when the ex	Administration	Help Logout Head Office en terminated. For n
	Navigator			Client Managen	ent - Referral			
	Chan, John(499202) Summary	Client No. 499	9202					
	History	Name Cha	an, John	DOB	1960/01/01	Age	57	
	Encounter	🔀 Close   🔜 Save						(j) Help
	Admission Referral Discharge	<ol> <li>Saved Successfully!</li> </ol>						
	Leave with Permission Service Restriction	Referral						
	Complaint	From Program*	Streets to Homes Assessmen	t and Referral Centre - Service	e Program			
	Case Management	Program*	Name		Туре	Phone		
-> Referral -	Attachment Tasks		Cornerstone Place		Bed	416-658-5224		
	Print Label Disbursemnts Eligibility Assessment Transactions - New Summary/Detail [+] Advanced	Reason for referral* (4/4000 characters)	test		~			
		Notes (52/4000 characters)	Called and talked to Joe Wh	no @ Cornerstone Office				
		Rejection Reason Rejection Note						





Figure 5: After a successfully saved referral, the client now appears in the service queue of the destination program, awaiting a bed hold and the client's arrival. Available destination **Actions** include **Hold Bed**, **Reject**, and **Intake/Accept**.

		Centre at (416	ase contact the Streets to nome ) 338-4994	s assessment and refe	Shelter: User:	JJJJJ, Linda	Home My Tasks Repo	rts Administration Help Logout Facility Shelter Head Office
	Navigator Cornerstone Place (11971) General	Back to Programs	nu extenti nours or operation to an	ow chents to stay indoor	Program	Management - Cornerstone Place	more mormation please contact the surger	
-> Referral	Queue Service Queue Queue History Clients	One item found.	Requested Bed	Waiting	Client Status		Last L Beds Available	Updated : 2017/11/09 01:59:32 F
	Service Restrictions Complaints Staff Dashboard Statistics Occupancy Occupancy - Unique	Chan, John One item found.	01:52 PM	00:06	En Route (no hold	(Cornerstone Place) [7]	N/A	Belect action Hold Bed Reject Intske/Accept





Figure 6: Below is the source program's **Service Queue** with reminders in the **Action** column for the source program staff to call the destination bed program to hold the bed/room.

		toronto SMI	S information please co	ntact the Streets to Ho 4994	mes Assessment and	I Referral Shelter: User: JJJJJJ, Linda Client Program	Reports Administration Facility Shelter	Help Logout Head Office						
		are expected to relax admi	ssions and discharge criteria, a	and extend hours of oper	ration to allow clients t	to stay indoors. Shelters will be notified when the extreme cold alert has been terminated. For more information please conta	act the Streets to Homes As	sessment and Refer						
		Streets to Homes	Program Management - Streets to Homes Assessment and Referral Centre - Service Program											
		Assessment and Referral	Back to Program											
		Program(11796)	Service Queue											
		General Oueue				La	st Updated : 2017/1	1/09 02:02:05 PM						
		Service Queue	11 items found, displaying	items found, displaying all items.										
		Queue History Clients Incidents	Name	Requested Bed	Waiting	Client Status	Beds Available	Action						
Refe	erral –		Alamillo, Perry	11:14 AM	170:47	Waiting	Y	Select action V						
		Service Restrictions Complaints	nnm, nnm	01:26 PM	72:36	Waiting [5]	C,M	Select action 🗸						
		Staff	joe, joe	03:40 PM	46:21	Waiting	C,M	Select action 🗸						
		Dashboard	Chan, John	01:52 PM	00:06	En Route (no hold)(Cornerstone Place) [7]	N/A	Call Shelter						
		Occupancy	Smullen, Wayne	08:42 AM	1087d 5h 19m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action V						
		Occupancy - Unique	Winson, Elli	07:35 PM	973d 18h 26m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action 🗸						
		Client Services	Berenbaum, Mireille	01:59 PM	945d 0h 2m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action 🗸						
		Client Services - Unique Clients	Cleckner, Ivory	04:11 PM	718d 21h 50m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action 🗸						
		Discharge	Shasteen, Zandra	12:39 PM	526d 1h 22m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action 🗸						
		Discharge - Unique Clients	Mulvehill, Nam	05:14 PM	385d 20h 48m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action 🗸						
		Reports	Topor, Virgie	10:03 AM	357d 3h 58m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action 🗸						
		Client Report	11 items found, displaying	all items.										





Figure 7: The destination program should hold a room/bed for the referred client. Here, the bed is being held at the destination program, awaiting the client's arrival.

Note that the Duration of the bed hold can be extended up to 2.5 hours beyond the initial hold time.

	toronto SMIS				נננננ , ו	inda	Home	My Tasks Re Program	eports Adminis Facility	tration Help Shelter	Logout Head Office
	Navigator			Se	rvice Demand - H	lold Room/Bed					
Hold Bed	Birchmount Residence (11816) General	Client No. Name	499142 wer, wer		DOB	1960/01/01		Age	57		
	Queue Service Queue	Close						-			
	Queue History Clients Incidents Service Restrictions	i) Saved Successfully!									
	Complaints Staff Dashboard Statistics	Hold Start Now	2017/11/07 03:32 PM 2017/11/13 12:20 PM		Tir	me Passed	140 hr 4	8 min			
	Occupancy - Unique Clients Client Services Client Services - Unique Clients Discharge	Hold End Hold Room/Bed*	2017/11/07 07:32 PM		Tir	ne Remaining	-136 hr	ion:4 hr -48 min			





Figure 8: Once a bed has been held by the destination program for the client, the source program's referral record has moved from the **Service Queue** to the **Queue History** and shows a **Client Status** of "En Route (Bed held)[x]" where x is the number of declined offers if they exist.

	toronto S M	and extend hours of be notified when the information please of Centre at (416) 338 Toronto Shelter Standards, Sh	op expected allow clients to stay indoors. Shell extreme cold alert has been terminated. For n ontact the Streets to Homes Assessment and R 4994 elters are expected to relax admissions and disch	ters will Shelter: hore User: eferral user: arge criteria, and extend hours o	JJJJJ, Linda f operation to allow clients to stay inde	cors. Shelters will be notified	Home My Tasks Rep Client Program when the extreme cold at	orts Administration He Facility Shelter ert has been terminated. Fo	lp Logout Head Office
Hold Bed -	Navigator Streets to Homes Assessment and Referral Centre - Service Program(11796) General	Back to Programs Nightly History (last 24 2 items found, displaying	Program N	Nanagement - Streets to H	lomes Assessment and Refer	ral Centre - Service Pr	rogram		
	Queue Service Queue	Name	Client Status	Referral Time	Completion Time	Travel Time	Referred To		
	Queue History	mmmn, mmmn	En Route (Bed held) [3]	09:30 AM	09:30 AM	04:34	Christie Ossin	gton Men's Hostel	
	Incidents	Chan, John	En Route (Bed held) [7]	01:58 PM	01:58 PM	00:05	Cornerstone P	lace	
	Service Restrictions	2 items found, displaying	all items:						







	toronto S M	Centre at (416) and discharge criteria, an	use contact the streets to nomes 338-4994 d extend hours of operation to allo	s Assessment and Nere by clients to stay indoor	Shelter: User: S. Shelters will be notified whe	33333, Linda In the extreme cold alert has been terminated. For	Home My Tasks Reports Client Program Fact more information please contact the Streets to H	Administration Help Logout lity Shelter Head Office omes Assessment and Referral Cent
Accept	Navigator Cornertone Place (11971) General Queue Service Queue Queue History Clients Incidents Service Restrictions Complaint Staff Dashboard Staffstics Occupancy Occupancy - Unique	Back to Programs			Program N	lanagement - Cornerstone Place		
(intake)		One item found.	Dequected Red	Waiting	Client Status		Last Upda	ted : 2017/11/09 01:59:32 F
		Chan, John One item found.	01:52 PM	00:06	En Route (no hold)(	Cornerstone Place) [7]	N/A	Beleta action Hold Bed Reject Intake/Accept







toronto S N As per the Toronto St	Shelters will be notified when the extreme cold alert has been terminated. For more information please contact the Streets to Homes Assessment and Referral Centre at (416) 338-4994 elter Standards, Shelters are expected to relax admissions and discharge criteria, and exten	Shelter: User: JJJJJJ, Linda hours of operation to allow clients to stay indoors. Shelters will be notified wher	Home         My Tasks         Reports         Administration         Help         Logout           Client         Program         Facility         Shelter         Head Office           n the extreme cold alert has been terminated. For more information please contained         For more information please contained         For more information please contained
Navigator		Client Management - Add/Edit Intake	
Accept (Intake) Chan, Shoh(499202) Summary History History History Achiniston Referral Discharge Leave vith Permiss	Client No. 499202 Name Chan, John Close   Save   Starily Intake   Admission   () This client was found and processed from program queue. () Saved Successfully!	DOB 1960/01/01	Age 57
Service Restriction Complaint Consent Case Management Attachment Tasks Print Label Dibursements	First name* John Gender* Male V Alias JC Referred by	Last name* Date of birth* (yyyy/mm/dd)	Chan [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01/01 [1960/01] [1960/01 [1960/01] [1960/01 [1960/01] [1960/01] [1960/01 [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/01] [1960/
Elijbility Assess Transactions - N Summary/Detail [+] Advanced	Referred by  Contact name Contact number Contact servel		





Figure 11: After an intake is completed at the destination program, in the source program's **Queue History**, the client is shown with a final **Client Status** of "Referral Accepted [x]" where x is the number of declined offers if they exist.

ļ	toronto <b>S M</b>	information please c Centre at (416) 338 o relax admissions and discha	ontact the Streets to Homes Assessment and F 4994 arge criteria, and extend hours of operation to allo	shelter: User: w clients to stay indoors. Shelter	JJJJJ, Linda s will be notified when the extreme col	[ ] d alert has been terminated.	Home         My Tasks         Reports         Administration         Help         Logout           Client         Program         Facility         Shelter         Head Office           For more information please contact the Streets to Homes Assessment         For more information         Program
Accept	Navigator Streets to Homes Assessment and Referral Centre - Service Program(11796) General Overse		Program	Management - Streets to F	lomes Assessment and Refer	ral Centre - Service Pr	ogram
(intake)		Nightly History (last 24	hours)				
		2 items found, displaying	all items.				
	Service Queue	Name	Client Status	Referral Time	Completion Time	Travel Time	Referred To
	Queue History	mmmn, mmmn	En Route (Bed held) [3]	09:30 AM	09:30 AM	04:37	Christie Ossington Men's Hostel
	Incidents Service Restrictions	Chan, John 2 items found, displaying	Referral Accepted [7]	01:58 PM	02:06 PM	00:07	Cornerstone Place





Figure 12: The destination program's service queue now has the following **Action** options available: "Refer to Bed" (to refer to another bed program), "Hold Bed" (to change the currently held bed), "Admit Local" (to perform a local admission), and "Closeout" (to process a client withdraw or staff closeout action).

Accept (intake)	toronto S M	and extend hours be notified when information pleas Centre at (416) 338-4994	s of operation to allow clients to stay inc the extreme cold alert has been termin e contact the Streets to Homes Assess 038-4994 T1P4 An extreme cold alert	loors. Shelters will ated. For more nent and Referral is in effect. As per the Toronto	ter: :- JJJJJ, Linda - Shelter Standards, Shelters are expected to r	Home Client elax admissions and discharge criteria, and	My Tasks Reports Program d extend hours of ope	Administration Facility Shelter Faction to allow client	Help Logout Head Office s to stay indoors. Sl
	Navigator Cornerstone Place (11571) General Queue Service Queue Queue History Clients Incidents Service Restrictions Complaints Staff Dashboard Statistics	Back to Programs			Program Management - Cornerstor	ne Place	Last Up	dated : 2017/11	/09 02:08:43 PI
		One item found. Name Chan, John One item found.	Requested Bed 02:06 PM	Waiting 00:00	Client Status En Route (Bed held)	Beds Available Rm:Room C - Bed4	(	Action Select action Refer to Bed Hold Bed Admit (local) Closeout	





Figure 13: The destination **Queue History** has a record of the referral with a **Client Status** of "Referral Accepted [x]" where x is the number of declined offers if they exist.

	toronto S M	IS information please contact th Centre at (416) 338-4994 ax admissions and discharge criteria, an	ne Streets to Homes Assessment and Referral	Shelter: User: JJ tay indoors. Shelters will be notified w	JJJ, Linda ien the extreme cold alert has been termina	Home My Tasks I Client Program ted. For more information please	Reports Administration Help Logout Facility Shelter Head Office contact the Streets to Homes Assessment and						
Accept (intake)	Navigator Cornerstone Place (11971) General Queue	Back to Programs           Nightly History (last 24 hours)           Liteme found displaying all items	Program Management - Cornerstone Place   Back to Programs  Nightly History (last 24 hours)										
	Queue History	Name	Client Status	Referral Time	Completion Time	Travel Time	Referred To						
	Incidents	AA, Holdi	Admitted	09:55 AM	09:56 AM	04:14	Cornerstone Place						
	Service Restrictions Complaints	Thurkson, Thomas	Admitted	10:59 AM	11:01 AM	03:10	Cornerstone Place						
	Staff	Chan, John	Referral Accepted [7]	01:58 PM	02:06 PM	00:07	Cornerstone Place						
	Dashboard	3 items found, displaying all items	5.										





Figure 14: If the client arrives and needs to be rejected, then "Reject" is chosen from the **Action** dropdown in the destination program's **Service Queue**.

	toronto SM	Centre at (4 discharge criteria, 4	prease contact the Streets to norm 16) 338-4994 Ind extend hours of operation to allo	es assessment and we	Shelter: User: JJJJJJ, Linda s. Shelters will be notified when the extreme cold alert has been terminated.	Home My Tasks Reports Client Program Fac For more information please contact the Streets to Ho	Administration Help Logout lity Shelter Head Office mes Assessment and Referral Centre						
Palastad	Navigator	Program Management - Cornerstone Place											
Rejected	(11971)	Back to Program	J Book to Programs										
	General	Service Queue											
	Service Queue Queue History	2 items found, dis	playing all items.		Last Upda	Last Updated : 2017/11/09 02:23:43 Pl							
	Incidents	Name	Requested Bed	Waiting	Client Status	Beds Available	Action						
	Service Restrictions	Chan, Tim	02:18 PM	00:00	En Route (no hold)(Cornerstone Place) [4]	N/A	Select action						
	Staff	Chan, John	02:06 PM	00:00	En Route (Bed held)	Rm:Room C - Bed4	Reject						
	Dashboard Statistics	2 items found, die	playing all items.				Intake/Accept						







	toronto S M I	be notified when the extreme cold al information please contact the Street Centre at (416) 338-4994 welters are expected to relax admissions and dis	rt has been terminated. For more s to Homes Assessment and Referral charge criteria, and extend hours of operation	inda ters will be notified when the extreme cold a	Home My Tasks Re Client Program alert has been terminated. For	oorts Administration Help Logout Facility Shelter Head Office more information please contact the Streets						
	Navigator Cornertone Place (11971) General Queue Service Queue Queue History Clients Incidents Service Restrictions		Client Manzgement - Admission Rejection									
Rejected		Client No. 4992 Name Chan	05 , Tim	DOB	1960/01/02	Age	57					
		(i) Saved Successfully!										
	Staff Dachbeard	Rejection Reason*	Highly Intoxicated	~								
	Dashboard Statistics Occupancy Occupancy - Unique Clients Client Services - Unique Clients	Rejection Note* (28/4000 charact	Client appears incoh	erent			$\hat{}$					
	Discharge											





Figure 16: The "Closeout" **Action** is to be chosen if the client has withdrawn their shelter request or if the destination program is unable to admit the client even after an Intake has already been done. The Staff Closeout option should only be selected as a final option to assist with queue maintenance. Every effort should be made to find the client a bed.

Withdrawn	toronto S M	T1P1 An extreme Standarde Shalte extreme cold alert has been	cold alert is in effect. As per the Toron or are expected to colve admissions ar terminated. For more information pleas	She to Shelter d discharge criteria e contact the Streets to Homes	ter: :: JJJJJ, Linda Assessment and Referrat Centre at (416) 338	Home My Tasks Client Program 14994 T1P4 An extreme cold alert is	Reports         Administration         Help         Logout           Facility         Shelter         Head Office           in effect. As per the Toronto Shelter Standards, S	
	Navigator Cornerstone Place (11971) General Queue Queue History Clients Incidents Service Queue Queue History Complaints Service Chan, Jo One item fr Dashboard Statistics Occupancy - Uninus	Back to Programs			Program Management - Cornersto	one Place	E	
-		Queue Service Queue Queue History One II Incidents Nan	One item found.	Requested Bed	Waiting	Client Status	Beds Available	Last Updated : 2017/11/09 02:33:32 P
		Chan, John One item found.	02:06 PM	00:00	En Route (Bed held)	Rm:Room C - Bed4	Select setion Red to be Advise to ad Advise (feat) Closeout	





Note: Bed Request Closeout Reason:

- Client Withdraw (when a client decided to withdraw their request for a room/bed)
- Staff Closeout (only select as a final option to assist with queue maintenance)

Figure 17: For a client withdraw, once the "Closeout" **Action** is selected, in the **Bed Request Closeout** screen, withdraw details are completed and saved.

	foronto S MI As per the Toronto Shelter	S and exterior mours or operation be notified when the extremmed information please contact th Centre at (416) 338-4994 Standards, Shelters are expected to re	In to anow cuents to stay motors. Snetters will e cold alert has been terminated. For more e Streets to Homes Assessment and Referral elax admissions and discharge criteria, and extend I	Shelter: User: nours of operation to allow	s. Shelters will be notified when the ext	Home         My Tasks         Reports         Administration         Help         Logout           Client         Program         Facility         Shelter         Head Office           hen the extreme cold alert has been terminated. For more information please cont         Head Office         Head Office							
	Corporations Disco		Client Management - Bed Request Closeout										
	(11971) General	Client No. Name	499202 Chan John	D	OB	1960/01/01	Age	57					
Withdrawn	General Quise Revice Queue Clients Incidents Service Restrictors Compliants Staff Dashboard Statistics Occupancy - Unique Client Client Services Client Services	Name Close I Saved Successfully! Bed Request Closeout Reason* Note* (63/4000 characters)	Client withdraw V Client decided to stay else	D	elter bed anymor	1960/01/01	Age	57					





Note: Bed Request Closeout Reason:

- Client Withdraw (when a client decided to withdraw their request for a room/bed)
- Staff Closeout (only select as a final option to assist with queue maintenance)

Figure 18: For a staff closeout, once the "Closeout" **Action** is selected, in the **Bed Request Closeout** screen, staff closeout details are completed and saved.

	toronto SMIS			Shelter: User:	33333, L	Linda	Home My Tasks Repor	rts Administration Help Lopout Facility Shelter Head Office		
	Navigator		Client Management - Bed Request Closeout							
	(11531) General Queue Service Queue Queue History Client No. Name Cose Queue History Client Services Complaints Staff Dashboard Statistics Occupancy Unique Client Services Client No. Cose Cose Bed Request Closeout Reason <sup>®</sup> Note <sup>®</sup> (55/4000 cha	Client No. Name	499147 az, az		DOB	1960/01/01	Age	57		
Staff Closeout		Close   (i) Saved Successfully!								
		Bed Request Closeout	Staff closeout 🗸			$\overline{}$				
		Note* (55/4000 characters	) No Bed available to	o offer, Client moved t	co Overflow			<u>`</u>		
	Discharna									





Figure 19: In a bed program, once the intake has been created, it is possible to perform an admission by choosing the "Admit (local)" option in the **Action** dropdown.

Note that an admission can still be done from the Intake screen using the <sup>9</sup> Admission I button.







Figure 20: The admission is then completed and saved.

Note that staff can still make changes to the Room/Bed assignments at this point.

	toronto SMI	5		Shelter: User:	,נננננ	Linda		Home My Tasks Client Progra	Reports	Administration ity Shelter	Help Logout Head Office
	Navigator			Clie	nt Manageme	nt - Admission					
	Cheung, John(499208) Summary	Client No.	499208								
	History	Name	Cheung, John		DOB	1960/01/02		Age		57	
	Encounter	🔀 Close   🛃 Save									(j) Help
	Admission Referral	<ol> <li>Saved Successfully!</li> </ol>									
	Discharge										
	Leave with Permission Service Restriction Complaint Consent Case Management Attachment Tasks Print Label	Program		Admi	ssion Date				Status		
		Cornerstone Place		2017,	11/10				admitted		
Local		Admission Information									
		Primary Worker	~								
Admission /	Disbursements Fligibility Assessment	Locker#			#	of Bags					
	Transactions - New Summary/Detail [+] Advanced	Next of Kin									
		Name		Relationship			Tel				
		Street 1		Street 2			City				
		Province		Postal Code			Country				
		Bed/Room*									
		Single/Family?	Single	Size	1 Head	/Member?				Head	
		Case 4	admitted single								
		Current Room	Room C								
		Current Bed	Bed4								
		Assign Room	Room C 🗸								
		Assign Bed	Bed4 🗸								





Figure 21: Once a client has been admitted, their referral history is captured and displayed in the Queue History screen of the destination program.

		S		Shelter: User: JJJJJJ,	Linda	Home         My Tasks         Reports         Administration         Help         Logout           Client         Program         Facility         Shelter         Head Office					
	Navigator Cornerstone Place			Program Management	Cornerstone Place						
Local	(11971) General Queue Service Queue	Back to Programs     Nightly History (last 24     S items found, displaying	hours) all items.								
Admission /	Queue History Clients	Name	Client Status	Referral Time	Completion Time	Travel Time	Referred To				
	Incidents	Chan, John	Withdrawn	02:06 PM	02:35 PM	23:46	Cornerstone Place				
	Service Restrictions Complaints	Chan, Tim	Rejected (Highly Intoxicated) [4]	02:18 PM	02:30 PM	23:34	Cornerstone Place				
	Staff	Chan, John	Referral Accepted [7]	01:58 PM	02:06 PM	00:07	Cornerstone Place				
	Dashboard Statistics	Cheung, John	Admitted	01:49 PM	01:52 PM	00:03	Cornerstone Place				
	Occupancy	Cheung, John	Referral Accepted [3]	01:48 PM	01:49 PM	00:00	Cornerstone Place				
	Occupancy - Unique Clients	5 items found, displaying	all ite <del>ms</del> ,								





# **Family Referrals**

For families, the Service Demand workflow is the same as described for singles. The only differences are as follows:

• Family clients are referred to Rooms, not Beds



• Rooms are held for families instead of Beds



• Family Accommodations are by Rooms, not Beds







• For families, availability is in terms of Rooms, not Beds

	Beds	Available
/	Rm.F	R 507
	Rm:	R 315
	Rm:F	R 210
	Rm/F	R 315
	$\sim$	

• For families, occcupancy is measured in terms of Rooms occupied instead of occupied beds

One	record found.						_		Record	per page 20	~
	Name	Туре	Acc	Status	Facility	Occupancy	Queue	Capacity	Vacancy	On Hold	
Edi	Birkdale Residence - Roycroft Site	Bed	Rooms	Active	Roycroft Motel		7	1 1	6	9	0
One	record found.										

For families, vacancy is determined in terms of Rooms not occupied instead of unoccupied beds
 Programs

One re	cord found.								Recor	rd per page 20	~
	Name	Туре	Acc	Status	Facility	Occupancy	Queue	Capacity	Vacancy	On Hold	
Edit	Birkdale Residence - Roycroft Site	Bed	Rooms	Active	Roycroft Motel		7	1 1	6	9	0
One re	cord found.								$\sim$		





• Family intakes include all members of the family and there is a family size [counter] after the Name of the head of the family in the Queues. Only the head of a family appears in the Queues.

	C			Shelter:		Home My Tasks	Reports	Administrat	ion He	p Logout	
	2			User: JJ	JJJ, Linda	Client Progra	n F	acility	Shelter	Head Office	
Nevientes											
Navigator				Program Managemer	nt - Central Family Intake						
(11851)	Back to Programs										
General	Service Queue										
Service Queue							Last Und	lated • 20	17/11/1	4.03.56.06 PM	
Queue History	7 items found, displaying a	7 items found, displaying all items.									
Incidents	Name	Requested Bed	Waiting	Client Status			B	eds Availa	able /	Action	
Service Restrictions	nest, jim	02:34 PM	00:10	En Route (no hold)(Family Residence - C	Co-Ed) [3]		N/	/Α	C	Call Shelter	
Staff	Baldo, Siu	01:29 PM	00:00	En Route (no hold)(Streets to Homes As	N/	/Α	C	all Shelter			
Dashboard Statistics	Brown, James [3]	03.55 PM	00:00	Waiting			F			Select action 🗸	
Occupancy	Arganbright, Toney	09:56 AM	00:00	En Route (no hold)(University Settlemer	nt Special Circumstance Program)		N/	/Α	C	Call Shelter	
Occupancy - Unique Clients	Arganbright, Toney	10:01 AM	00:00	En Route (no hold)(University Settlemer	nt: Extreme Weather Program)		N/	/Α	C	all Shelter	
Client Services	Arrendondo, Bambi	09:48 AM	50d 6h 7m	Pending Referral to Central Family Intak	N/	/Α		Select action 🗸			
Client Services - Unique Clients	Akiyama, Tammera	09:54 AM	50d 6h 1m	Pending Referral to Central Family Intak	e		N/	/A		Select action 🗸	
Discharge	7 items found, displaying a	all items.									

 The Request Bed (Room) button is only available in some Service Programs (e.g. SHARC, Central Intake), for the head of the family (i.e. one room request per family intake). For bed programs, the Room request is generated when an intake is created and no <sup>® Request Bed</sup> button is visible.