



**toronto** **S M I S**  
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

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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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Client Withdrawn [see *Figures 16 & 17 below* ]  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* ]
5. Accept (Intake at destination Program) [see *Figures 9-13 below* ]  
or  
Rejected [see *Figure 14 & 15 below* ]  
  
or
6. Client No Show

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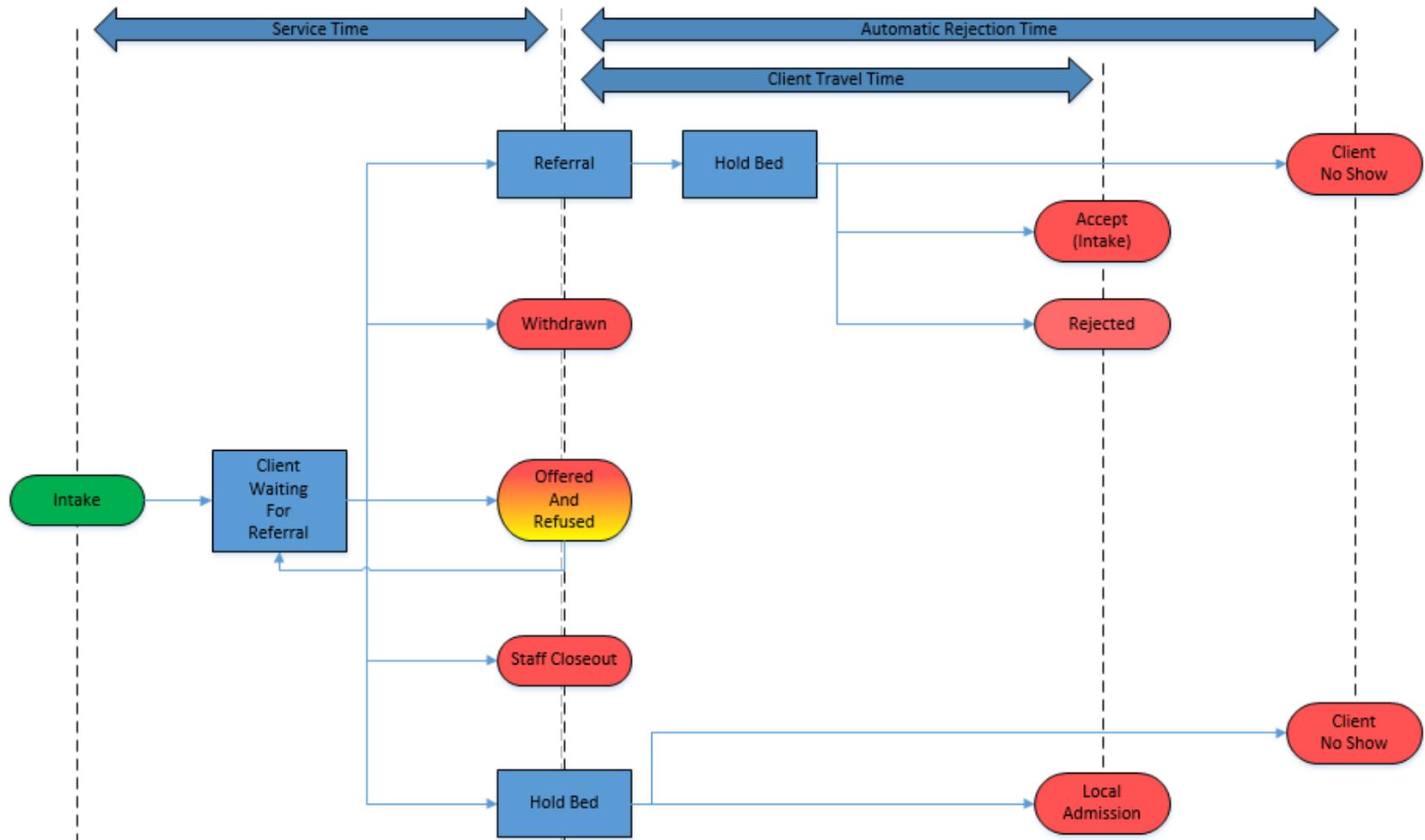


Diagram 1: Service Demand Workflow

### 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  [Request Bed](#) 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 **Service Demand Workflow** section above to see where the Figures below would appear within the workflow.)*

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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 **Request Bed** button if a bed is being requested. For bed programs, the bed request is generated when an intake is created and no **Request Bed** button is visible.

**Client Management - Add/Edit Intake**

Client No. 499202  
 Name Chan, John DOB 1960/01/01 Age 57

Close | Save | **Request Bed** | Family Intake | Help

Saved Successfully!

**Personal information**

First name\* John Last name\* Chan  
 Gender\* Male Date of birth\* 1960/01/01  
 Alias JC (existing client)

**Referred by**

Referred by  
 Contact name  
 Contact number  
 Contact email

**Other information**

Language  
 Aboriginal  
 VAW  
 Current sleeping arrangements\* Abandoned Building  
 Have you stayed in a shelter before?\* Yes  
 Reason for homelessness Length of homelessness  
 Reason for Service\* Eviction Due to Rental Arrears

**Presenting issues**

Disability Disclosed substance use

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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 **Co-ed** and **Mens** 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.

Client Waiting For Referral

toronto **SMIS** Information please contact the Streets to Homes Assessment and Referral Centre at (416) 338-4994

Shelter: JJJJJ, Linda

T1P4 An extreme cold alert is in effect. As per the Toronto Shelter Standards, Shelters are expected to relax admissions and discharge criteria, and extend hours of operation to allow clients to stay indoors. Shelters will be notified when the extreme cold alert

Program Management - Streets to Homes Assessment and Referral Centre - Service Program

Last Updated : 2017/11/09 01:52:47 P

Name	Requested Bed	Waiting	Client Status	Beds Available	Action
Alamillo, Perry	11:14 AM	170:38	Waiting	Y	Select action ...
nnm, nnm	01:26 PM	72:26	Waiting [5]	C,M	Select action ...
joe, joe	03:40 PM	46:12	Waiting	C,M	Select action ...
Chan, John	01:52 PM	00:00	Waiting	C,M	Select action ... Refer to Bed Closeout
Smullen, Wayne	08:42 AM	1087d 5h 10m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Winson, Elli	07:35 PM	973d 18h 16m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Berenbaum, Mireille	01:59 PM	944d 23h 53m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Cleckner, Ivory	04:11 PM	718d 21h 40m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Shasteen, Zandra	12:39 PM	526d 1h 13m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Mulvehill, Nam	05:14 PM	385d 20h 38m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Topor, Virgie	10:03 AM	357d 3h 48m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...

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

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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.*

**Client Management - Refer To Bed**

Client No. 499202  
 Name Chan, John  
 DOB 1960/01/01  
 Age 57

Filter

Include program with no vacancy  
 Include all program  
 Apply Filter

Name	Action	Acc	Occupancy	Queue	Capacity	Vacancy	On Hold	Decline
Barrett House	Decline Refer	Beds	3	0	5	2	0	1
Birchmount Residence	Decline Refer	Beds	56	5	70	4	3	2
Christie Ossington Men's Hostel	Decline Refer	Beds	54	4	63	8	1	1
Cornerstone Place	Decline Refer	Beds	60	0	80	4	5	1
Downsview Dells Bedded Program	Decline Refer	Beds	26	0	28	1	2	
Downsview Dells: Special Circumstance Program	Decline Refer	Beds	0	0	2	2	0	
Family Residence - Co-Ed	Decline Refer	Beds	11	1	40	7	0	1
Fort York Extreme Weather Program	Decline Refer	Beds	13	0	19	5	1	1
Fort York SRO Units Program	Decline Refer	Beds	23	0	24	1	0	
Fred Victor Bethlehem United Special Circumstance Program	Decline Refer	Beds	1	0	3	2	0	
Heyworth House Special Circumstance Program	Decline Refer	Beds	0	0	2	2	0	
Homes First Society - Flex Program	Decline Refer	Beds	4	0	5	1	0	
Homes First Society - Scarborough Shelter	Decline Refer	Beds	65	1	67	1	1	

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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.

The screenshot shows the SMIS interface for a referral. At the top, there is a navigation bar with 'Client Management - Referral' highlighted. Below this, client details are shown: Client No. 499202, Name Chan, John, DOB 1960/01/01, and Age 57. A 'Saved Successfully!' message is displayed. The 'Referral' section contains a table with columns 'From Program\*', 'Program\*', 'Name', 'Type', and 'Phone'. The entry shows 'Streets to Homes Assessment and Referral Centre - Service Program' with 'Cornerstone Place' as the program name, 'Bed' as the type, and '416-658-5224' as the phone number. Below the table, there are text areas for 'Reason for referral\*' (containing 'test'), 'Notes (52/4000 characters)' (containing 'Called and talked to Joe Who @ Cornerstone Office...'), and 'Rejection Reason' and 'Rejection Note'.

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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**.

Information please contact the Streets to Homes Assessment and Referral Centre at (416) 338-4994

Shelter: JJJJJ, Linda

Home My Tasks Reports Administration Help Logout

Client Program Facility Shelter Head Office

ected to relax admissions and discharge criteria, and extend hours of operation to allow clients to stay indoors. Shelters will be notified when the extreme cold alert has been terminated. For more information please contact the Streets to Homes Assessment and Referral Cent

Navigator

- Cornerstone Place (11971)
- General
- Queue
- Service Queue**
- Queue History
- Clients
- Incidents
- Service Restrictions
- Complaints
- Staff
- Dashboard
- Statistics
- Occupancy - Unique

Program Management - Cornerstone Place

Back to Programs

Service Queue

Last Updated : 2017/11/09 01:59:32 F

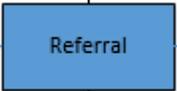
One item found.

Name	Requested Bed	Waiting	Client Status	Beds Available	Action
Chan, John	01:52 PM	00:06	En Route (no hold)(Cornerstone Place) [7]	N/A	Select action ... Hold Bed Reject Intake/Accept

One item found.

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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.



Referral



Information please contact the Streets to Homes Assessment and Referral Centre at (416) 338-4994

Shelter: JJJJ, Linda  
User: JJJJ, Linda

Home My Tasks Reports Administration Help Logout

Client Program Facility Shelter Head Office

are expected to relax admissions and discharge criteria, and extend hours of operation to allow clients to stay indoors. 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

Program Management - Streets to Homes Assessment and Referral Centre - Service Program

Back to Programs

Service Queue

Last Updated : 2017/11/09 02:02:05 PM

Name	Requested Bed	Waiting	Client Status	Beds Available	Action
Alamillo, Perry	11:14 AM	170:47	Waiting	Y	Select action ...
nnm, nnm	01:26 PM	72:36	Waiting [5]	C,M	Select action ...
joe, joe	03:40 PM	46:21	Waiting	C,M	Select action ...
Chan, John	01:52 PM	00:06	En Route (no hold)(Cornerstone Place) [7]	N/A	Call Shelter...
Smullen, Wayne	08:42 AM	1087d 5h 19m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Winson, Elli	07:35 PM	973d 18h 26m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Berenbaum, Mireille	01:59 PM	945d 0h 2m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Cleckner, Ivory	04:11 PM	718d 21h 50m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Shasteen, Zandra	12:39 PM	526d 1h 22m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Mulvehill, Nam	05:14 PM	385d 20h 48m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...
Topor, Virgie	10:03 AM	357d 3h 58m	Pending Referral to Streets to Homes Assessment and Referral Centre - Service Program	N/A	Select action ...

11 items found, displaying all items.

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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.*

The screenshot displays the 'Hold Room/Bed' interface in the SMIS system. On the left, a blue button labeled 'Hold Bed' is visible. The main content area shows the following details:

- Client No.:** 499142
- Name:** wer, wer
- DOB:** 1960/01/01
- Age:** 57

A message indicates: (i) Saved Successfully!

The 'Hold Room/Bed' table shows the following data:

Hold Room/Bed	Hold Start	Time Passed	Duration
Now	2017/11/13 12:20 PM		Duration: 4 hr
Hold End	2017/11/07 07:32 PM	Time Remaining	-136 hr -48 min
Hold Room/Bed*	BRM 06 - M-6-02		

A red oval highlights the 'Now' row, indicating the current hold status and its duration of 4 hours.

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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.

Hold Bed

The screenshot shows the SMIS interface for 'Program Management - Streets to Homes Assessment and Referral Centre - Service Program'. A blue button labeled 'Hold Bed' is on the left. The main area displays a table of referral records under the 'Queue History' tab. The table has columns for Name, Client Status, Referral Time, Completion Time, Travel Time, and Referred To. Two records are shown: 'mmm, mmmn' with status 'En Route (Bed held) [3]' and 'Chan, John' with status 'En Route (Bed held) [7]'. Red circles highlight the 'En Route (Bed held) [7]' status and the 'Nightly History (last 24 hours)' tab header.

Name	Client Status	Referral Time	Completion Time	Travel Time	Referred To
mmm, mmmn	En Route (Bed held) [3]	09:30 AM	09:30 AM	04:34	Christie Ossington Men's Hostel
Chan, John	En Route (Bed held) [7]	01:58 PM	01:58 PM	00:05	Cornerstone Place

## SMIS v3.4 Release Service Demand Enhancement – User Guide

Figure 9: When the client arrives at the destination program, the "Intake/Accept" **Action** is selected from the dropdown.

The screenshot shows the SMIS web application interface. On the left, a red oval labeled "Accept (Intake)" has an arrow pointing to the "Intake/Accept" option in a dropdown menu. The main content area displays the "Program Management - Cornerstone Place" page. A table lists a client named John Chan with a requested bed at 01:52 PM and a waiting time of 00:06. The "Action" column for this client shows a dropdown menu with "Intake/Accept" selected and circled in red.

Name	Requested Bed	Waiting	Client Status	Beds Available	Action
Chan, John	01:52 PM	00:06	En Route (no hold)(Cornerstone Place) [7]	N/A	Intake/Accept

## SMIS v3.4 Release Service Demand Enhancement – User Guide

Figure 10: And an intake is successfully created and processed from the queue by the destination program.

The screenshot shows the 'Client Management - Add/Edit Intake' interface. On the left is a 'Navigator' menu with 'Intake' selected. The main area displays client details for John Chan (Client No. 499202). A red oval highlights a message: 'This client was found and processed from program queue. Saved Successfully!'. Below this are fields for personal information and a 'Referred by' section.

Client No.	499202
Name	Chan, John
DOB	1960/01/01
Age	57

Message: This client was found and processed from program queue. Saved Successfully!

Personal information:

First name*	John	Last name*	Chan
Gender*	Male	Date of birth* (yyyy/mm/dd)	1960/01/01
Alias	JC		(existing client)

Referred by:

Referred by	
Contact name	
Contact number	
Contact email	

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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.

The screenshot shows the SMIS interface for the 'Streets to Homes Assessment and Referral Centre - Service Program'. A red box highlights a message: 'information please contact the Streets to Homes Assessment and Referral Centre at (416) 338-4994'. The user is identified as 'User: JJJJJ, Linda'. A red banner at the top states: 'is, Shelters are expected to relax admissions and discharge criteria, and extend hours of operation to allow clients to stay indoors. 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'. The main content area is titled 'Program Management - Streets to Homes Assessment and Referral Centre - Service Program' and shows a 'Nightly History (last 24 hours)' table with 2 items found. The table has columns for Name, Client Status, Referral Time, Completion Time, Travel Time, and Referred To. The second row shows 'Chan, John' with a 'Referral Accepted [7]' status, which is circled in red. A red oval on the left side of the interface contains the text 'Accept (Intake)'.

Name	Client Status	Referral Time	Completion Time	Travel Time	Referred To
mmm, mmmn	En Route (Bed held) [3]	09:30 AM	09:30 AM	04:37	Christie Ossington Men's Hostel
Chan, John	Referral Accepted [7]	01:58 PM	02:06 PM	00:07	Cornerstone Place

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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).

and extend hours of operation to allow clients to stay indoors. 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

Shelter: JJJJJ, Linda  
User: JJJJJ, Linda

Home My Tasks Reports Administration Help Logout  
Client Program Facility Shelter Head Office

Assessment and Referral Centre at (416) 338-4994 **TIP4 An extreme cold alert is in effect. As per the Toronto Shelter Standards, Shelters are expected to relax admissions and discharge criteria, and extend hours of operation to allow clients to stay indoors. S**

Program Management - Cornerstone Place

Back to Programs

Service Queue

Last Updated : 2017/11/09 02:08:43 PM

One item found.

Name	Requested Bed	Waiting	Client Status	Beds Available	Action
Chan, John	02:06 PM	00:00	En Route (Bed held)	Rm:Room C - Bed4	Select Action ... Refer to Bed Hold Bed Admit (local) Closeout

One item found.

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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.

The screenshot shows the SMIS interface for 'Cornerstone Place (11971)'. The 'Queue History' section is active, displaying a table of referrals. The table has columns for Name, Client Status, Referral Time, Completion Time, Travel Time, and Referred To. The entry for 'Chan, John' has a 'Client Status' of 'Referral Accepted [7]', which is circled in red in the original image.

Name	Client Status	Referral Time	Completion Time	Travel Time	Referred To
AA, Holdi	Admitted	09:55 AM	09:56 AM	04:14	Cornerstone Place
Thurkson, Thomas	Admitted	10:59 AM	11:01 AM	03:10	Cornerstone Place
Chan, John	Referral Accepted [7]	01:58 PM	02:06 PM	00:07	Cornerstone Place

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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**.

The screenshot shows the SMIS interface for 'Program Management - Cornerstone Place'. On the left, a red oval labeled 'Rejected' has an arrow pointing to the 'Service Queue' section in the left-hand menu. The main content area displays a table with the following data:

Name	Requested Bed	Waiting	Client Status	Beds Available	Action
Chan, Tim	02:18 PM	00:00	En Route (no hold)(Cornerstone Place) [4]	N/A	Select action... Hold Bed Reject Intake/Accept
Chan, John	02:06 PM	00:00	En Route (Bed held)	Rm:Room C - Bed4	

The 'Reject' option in the 'Action' column for the first row is circled in red. The interface also includes a top navigation bar with links like Home, My Tasks, Reports, Administration, Help, Logout, and a user profile for 'JJJJ, Linda'.

## SMIS v3.4 Release Service Demand Enhancement – User Guide

Figure 15: The rejection details are then completed and saved in the **Referral Rejection** screen.

toronto **SMIS** 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

Shelter: JJJJJ, Linda  
User: JJJJJ, Linda

Home My Tasks Reports Administration Help Logout  
Client Program Facility Shelter Head Office

Onto Shelter Standards, Shelters are expected to relax admissions and discharge criteria, and extend hours of operation to allow clients to stay indoors. Shelters will be notified when the extreme cold alert has been terminated. For more information please contact the Streets

Client Management - Admission Rejection

<b>Client No.</b>	499205
<b>Name</b>	Chan, Tim
<b>DOB</b>	1960/01/02
<b>Age</b>	57

Close

Saved Successfully!

Admission Rejection

Rejection Reason\* Highly Intoxicated

Rejection Note\* (28/4000 characters) Client appears incoherent...

Rejected

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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.

The screenshot shows the SMIS interface for 'Program Management - Cornerstone Place'. A red box highlights the 'Withdrawn' button in the left sidebar. A red banner at the top contains a TIP4 alert: 'An extreme cold alert is in effect. As per the Toronto Shelter Standards, S... 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'. The main content area shows a table with one item found:

Name	Requested Bed	Waiting	Client Status	Beds Available	Action
Chan, John	02:06 PM	00:00	En Route (Bed held)	Rm:Room C - Bed4	<ul style="list-style-type: none"> <li>Select action...</li> <li>Refer to Bed</li> <li>Hold Bed</li> <li>Admit (local)</li> <li><b>Closeout</b></li> </ul>

The 'Closeout' action in the dropdown menu is circled in red. The interface also shows a 'Service Queue' section and a 'Last Updated' timestamp of 2017/11/09 02:33:32 PM.

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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.

The screenshot shows the 'Client Management - Bed Request Closeout' interface. On the left is a 'Navigator' menu with a 'Withdrawn' button highlighted. The main content area displays client information for 'Chan, John' (Client No. 499202, DOB 1960/01/01, Age 57). A 'Saved Successfully!' message is shown. Below, the 'Bed Request Closeout' form has 'Reason\*' set to 'Client withdraw' and a note: 'Client decided to stay elsewhere, not need shelter bed anymore.' A red circle highlights the 'Reason\*' dropdown and the note field.

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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.

The screenshot displays the 'Client Management - Bed Request Closeout' interface. At the top, it shows the user's shelter (JJJJJ, Linda) and navigation links (Home, My Tasks, Reports, Administration, Help, Logout). The client information is as follows:

<b>Client No.</b>	499147
<b>Name</b>	az, az
<b>DOB</b>	1960/01/01
<b>Age</b>	57

A 'Close' button is visible next to the client details. Below this, a 'Saved Successfully!' message is shown. The 'Bed Request Closeout' section contains a 'Reason\*' dropdown menu with 'Staff closeout' selected, and a 'Note\*' field with the text 'No Bed available to offer, Client moved to Overflow....'. A red oval highlights the dropdown menu and the note field. On the left side of the interface, a red callout box with an arrow points to the 'Staff Closeout' option in the 'Navigator' menu.

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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  Admission | button.**

toronto **SMIS** Shelter: JJJJJ, Linda User: JJJJJ, Linda

Home My Tasks Reports Administration Help Logout  
Client Program Facility Shelter Head Office

Program Management - Cornerstone Place

Service Queue

Last Updated : 2017/11/10 01:50:42 PM

One item found.

Name	Requested Bed	Waiting	Client Status	Beds Available	Action
Cheung, John	01:49 PM	00:01	En Route (Bed held)	Rm:Room C - Bed10	<ul style="list-style-type: none"> <li>Refer to Bed</li> <li>Admit (local)</li> <li>Closeout</li> </ul>

One item found.

Local Admission

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Figure 20: The admission is then completed and saved.

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

The screenshot shows the SMIS interface for Client Management - Admission. A red oval highlights the 'Local Admission' button on the left sidebar. The main form displays the admission details for Client No. 499208, Cheung, John, with a 'Saved Successfully!' message. The 'Bed/Room\*' section shows the current room as 'Room C' and the current bed as 'Bed4', both of which are circled in red. The 'Assign Room' and 'Assign Bed' dropdown menus are also visible.

Program	Admission Date	Status
Cornerstone Place	2017/11/10	admitted

Single/Family?	Size	Head/Member?
Single	1	Head
Case 4	admitted single	
Current Room	Room C	
Current Bed	Bed4	
Assign Room	Room C	
Assign Bed	Bed4	

## SMIS v3.4 Release Service Demand Enhancement – User Guide

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

The screenshot displays the 'Queue History' screen for 'Cornerstone Place'. On the left, a red oval labeled 'Local Admission' points to the 'Queue History' link in the sidebar. The main content area shows a table of referral history. A red oval highlights the 'Nightly History (last 24 hours)' link in the top navigation bar. Another red oval highlights the 'Admitted' status for the client 'Cheung, John' in the table. The table data is as follows:

Name	Client Status	Referral Time	Completion Time	Travel Time	Referred To
Chan, John	Withdrawn	02:06 PM	02:35 PM	23:46	Cornerstone Place
Chan, Tim	Rejected (Highly Intoxicated) [4]	02:18 PM	02:30 PM	23:34	Cornerstone Place
Chan, John	Referral Accepted [7]	01:58 PM	02:06 PM	00:07	Cornerstone Place
Cheung, John	Admitted	01:49 PM	01:52 PM	00:03	Cornerstone Place
Cheung, John	Referral Accepted [3]	01:48 PM	01:49 PM	00:00	Cornerstone Place

## 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

Client Status
En Route (no hold)(Family)
En Route (Room held) [5]
En Route (Room held) [7]

- Family Accommodations are by Rooms, not Beds

Action	Acc
Decline Refer	Rooms
Decline Refer	Rooms
Decline Refer	Rooms

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

Beds Available
Rm:FR 507
Rm:FR 315
Rm:FR 210
Rm:FR 315

- For families, occupancy is measured in terms of Rooms occupied instead of occupied beds

Programs

Record per page 20

One record found.

Name	Type	Acc	Status	Facility	Occupancy	Queue	Capacity	Vacancy	On Hold
<a href="#">Edit</a> Birkdale Residence - Roycroft Site	Bed	Rooms	Active	Roycroft Motel	7	1	16	9	0

One record found.

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

Programs

Record per page 20

One record found.

Name	Type	Acc	Status	Facility	Occupancy	Queue	Capacity	Vacancy	On Hold
<a href="#">Edit</a> Birkdale Residence - Roycroft Site	Bed	Rooms	Active	Roycroft Motel	7	1	16	9	0

One record found.

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- 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.

toronto **SMIS** Shelter: JJJJJ, Linda User: JJJJJ, Linda

Home My Tasks Reports Administration Help Logout  
Client Program Facility Shelter Head Office

Program Management - Central Family Intake

Back to Programs

Service Queue

Last Updated : 2017/11/14 03:56:06 PM

7 Items found, displaying all items.

Name	Requested Bed	Waiting	Client Status	Beds Available	Action
nest, jim	02:34 PM	00:10	En Route (no hold)(Family Residence - Co-Ed) [3]	N/A	Call Shelter...
Baldo, Siu	01:29 PM	00:00	En Route (no hold)(Streets to Homes Assessment and Referral Centre - Respite Program) [1]	N/A	Call Shelter...
<b>Brown, James [3]</b>	<b>03:55 PM</b>	00:00	Waiting	F	Select action ...
Arganbright, Toney	09:56 AM	00:00	En Route (no hold)(University Settlement Special Circumstance Program)	N/A	Call Shelter...
Arganbright, Toney	10:01 AM	00:00	En Route (no hold)(University Settlement: Extreme Weather Program)	N/A	Call Shelter...
Arrendondo, Bambi	09:48 AM	50d 6h 7m	Pending Referral to Central Family Intake	N/A	Select action ...
Akiyama, Tammera	09:54 AM	50d 6h 1m	Pending Referral to Central Family Intake	N/A	Select action ...

7 Items found, displaying 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 Request Bed button is visible.