toronto SMIS
Shelter Management
Information System

TORONTO

Program Management Clients Screen

Updated on February 2018

Home > Program Management – Search > Clients

Business Purpose:

The **Program Management (Clients)** page displays a listing of all the current admitted clients in the Program. From this listing, the user can go to a particular Client's navigator, select a group of Clients for batch discharge, or swap beds between two single clients or swap rooms between two families.

How to:

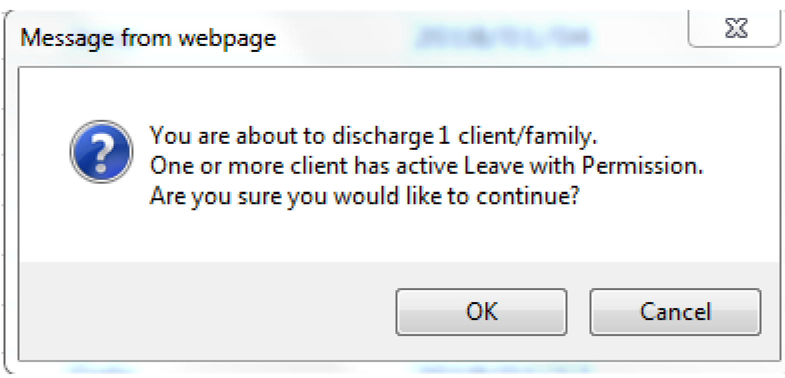
1. From the **Program Management – Search** screen, click the **Occupancy** count of the Program you want to go to the Program's **Clients** listing screen.
2. The column headings in the listing: **Client No., Last Name, First Name, Admission Date/Intake Date, Room Bed, Leave With Permission and PNA Eligibility,** can all be clicked to sort in ascending or descending order.
3. In the upper part of the screen, the **Client No., First Name and Last Name** can all be used to filter a search for a particular Client or family.
4. Click Search after entering the criteria to execute a filtered search.
5. Click Reset to clear out all search criteria
6. Click Print Bed Check List to print a list of all active and admitted Clients. This list is also known as *the Bed List*.
7. Click on the **Client No.** to go to the client's **Client Management – Summary** screen.
8. For the head of a Client family, there is a ☐ in the **Select** column. In the case of a singles Program, there is a ☐ for every Client.
9. To swap Rooms for families, select two heads of families by clicking on their respective ☑'s, then click on Swap Rooms/Beds button to execute the swap.

10. To perform a batch discharge after doing a bed check, check off clients to be discharged by their ☑ 's. then select the Discharge Disposition and Discharge Reason from their respective dropdowns at the bottom of the page, followed by clicking on the Batch Discharge button.

11. Click the Back to Programs action button to back to the **Program Management – Search** screen.

Important Notes:

1. When a Client has an active Leave With Permission and this client is checked off ☑ in batch discharge, a pop-up warning of *"You are about to discharge <Number of Clients> client/family. One or more client has active Leave with Permission. Are you sure you would like to continue?".* User may click **OK** button to process the batch discharge otherwise it will cancel the discharge action.



2. Once a client with LWP has been discharged from the program, the client's LWP record will be automatically expired and Expired Early Date and Expired Early comments are auto populated.