To Edit a Client Intake

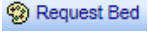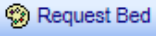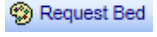*Updated on February 2018*

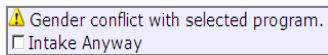**Home > Client Management (Search Client) > Intake > Update**
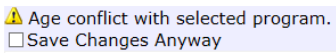
Business Purpose:

There may be times where a client can provide additional information they have not already provided to you. An update can occur at any time for a client with an active intake within the Client Management module. Once the initial client information has been captured and saved within SMIS, you will simply need to find the client once again via a client search, and select the Intake option within the Navigator perform updates in the intake page.

How to:

1. Enter or update any information in all fields in the **Personal Information, Referred by**, **Other information**, **Presenting issues, Identification, Source of Income, and Comments/Details** tabs on the screen as necessary. Whenever available, use the drop-down arrow next to the field for selection. For fields with long lists (i.e. Language and Country of origin), click on the 🔍 icon to select from a list of values.

2. Select the **Save** action button to save the information entered on the intake form.

3. If the source program is a service program, then there will be a [🎨 Request Bed] button on a new intake screen. Click the [🎨 Request Bed] button if a room/bed is being requested. For bed programs, the bed request is automatically generated when an intake is created and no [🎨 Request Bed] button is visible.

Important Notes:

1. A Gender warning [⚠ Gender conflict with selected program. ☐ Intake Anyway] will appear if a Male client has an

   Intake into a Female program and vice versa. Transgender clients can go in all programs. To proceed, check off Intake Anyway then Save.

2. An Age Conflict warning [⚠ Age conflict with selected program. ☐ Save Changes Anyway] will appear if the age of the client does not correspond with the selected program. For instance, if a Youth has an Intake into an Adult program or vice versa. To proceed, check off Intake Anyway then Save.

3. Note that you cannot revise the program from one type to another (e.g. from a service Program to a bed Program) after creation of the Intake. You must do a new intake in order to switch a client to another type of Program.

4. Information for all 3 fields listed below the OW/ODSP Status tab will automatically be populated within 24 hours after an intake has been saved within SMIS.

5. Once an intake for a bed program has been saved, you will be given new options such as: Begin a Family intake (for family shelters), Request a Bed (for service programs) or simply admit the single client to your bed program by clicking the Admission action button.

6. The Admission action option is not available when processing an intake for a service program. The term "admitted" in SMIS refers to placing a single client in a bed or a family in a room.

7. 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).

8. If 🐢 Request Bed button is clicked, Program's Service Queue screen is displayed and client is added to the Service Queue.

9. Note that 🐢 Request Bed button can only be processed once per intake otherwise an error message is displayed: "A bed request for this intake has already been completed, only one bed request per intake."