To Create a New Client (Intake)

Updated on April 2018

Home > Client Management (Search Client) > New Client

Business Purpose:

There are instances when a client you are looking for does not appear in the client search list after performing a search. This indicates that the client has never been in the Toronto Shelter System so you will need to create the initial client record before anything can be done with that client within SMIS.

This New Client screen will allow you to create the initial client record plus the intake record for the selected program. It is recommended you enter as much information as you have available for the client. Mandatory fields are marked with an * and MUST be filled in order to Save the client information. Also, it allows you to request a bed for a single or family client if a bed is being requested from a service program (e.g. SHARC, Central Intake, Drop-Ins).

The mandatory fields are: First name, Last name, Gender, Date of birth, Current sleeping arrangements, Have you stayed in a shelter Before, Reason for Service, at least one Source of Income, Lived the last 12 months, Program and Comment/Details.

How to:

1. If creating a new client, then begin by entering the client's first name into the First name text box. If you are just creating a new intake for an existing client, go to step 6.

2. Enter the client's last name into the Last name text box.

3. In the Gender text box and select from the drop-down list; Female, Male, or Transgender.

4. In the Date of Birth field, enter the date manually or select the date from the calendar popup.

5. Select the Current Sleeping Arrangement text box and make a selection from the drop-down.

6. Select the Have you stayed in a Shelter before? text box and select Yes or No.

7. Select the Reason for Service textbox and make a selection from the drop-down

list.

8. Select at least one Source of Income using the checkboxes provided.

9. Select the Lived the last 12 months text box and select from the drop-down list.

10. If program is not already selected, then select the Program text box and select a bedded program from the available Program options.

11. Select the Comments/Details textbox to enter notes about the client.

12. Enter or update any other information in all non-mandatory fields in the **Referred by**, **Other information**, **Presenting issues** and **Identification** 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.

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

14. 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. 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 to view or perform updates in the intake page.

5. 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.

6. 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.

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

8. If a new intake is initiated into a program to which a client has already had an intake, the new intake will retrieve most of the data from the previous intake (with the exception of mandatory fields) and present it on the screen. Your most recent intake within the previous 90 days is used. If an intake was not completed for that client and that program in the last 90 days then a blank intake is shown.

9. 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).

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

11. 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."