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## Client Summary Screen

Updated on September 2020

[Home](#) > [Client Management \(Search Client\)](#) > [Summary](#)

### Business Purpose:

The Client Management – Summary page displays a basic profile of clients **Personal & Key Information, Current Programs, Family and Referrals** in separate sections.

The Personal information includes the Client's Last Name, First Name, Alias, SMIS Client Number, Date of Birth, Gender, Pronoun, Phone, Email and SMIS Status (Active if admitted to a bed/room).

The Key information section shows any Health and Safety Alert(s) regarding the Client (includes message, who entered it, and date entered). Followed by the total # of bed nights since the beginning of SMIS, December of 2009, the total number of bed nights over the past year and the total number of bed nights over the past 3 years.

*A Chronic homeless statement and buttons will then be displayed if under the Federal Reaching Home Directives definition of chronic homelessness, the Client has at least one of the following two conditions:*

- *a total of at least 6 months (180 days) of homelessness over the past year.*
- *recurrent experiences of homelessness over the past 3 years, with a cumulative duration of at least 18 months (546 days).*

Clicking on the **Chronically homeless** button will open up a window showing the above mentioned Federal definition. And clicking on the [housing assistance](#) link will open up a window to the Subsidized Housing & Housing Benefits website.

The **Bed/Room** tab displays the **Assigned Room** and the **Assigned Bed** (for non-families).

The **Current Program** tab displays any active bed program admissions including the Admission date, Assigned Bed/Room and any other active service program intakes for the client.

The **Family** tab displays members of family information when applicable.

The **Referrals** tab shows any current active referrals and their status for the client.

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## How to:

1. The clickable fields on this Summary screen are the:
  - a) [Email address](#) of the Client,
  - b) [Program Names](#), once clicked, the user will be taken to the program's client listing screen.
  - b) [Client IDs](#) in the **Family** tab, once clicked, it displays the family members information.
  
2. There are also other shortcuts on this page which are clickable:  
[View Intakes](#), [View programs history](#), and [View all referrals](#) links to their respective screens for the Client, without having to go thru the Client Navigator.