



SMIS Release Notes

Version 3.5

April 2021

This document describes the enhancements that are being made to the Shelter Management Information System (SMIS) as part of version 3.5, being released on April 1, 2021.

There are a total of 18 enhancements in this release, of which all will be visible by end users.

Please note that this document will also be available online at <http://www.toronto.ca/housing/smis/smisuser.htm>

Enhancements:

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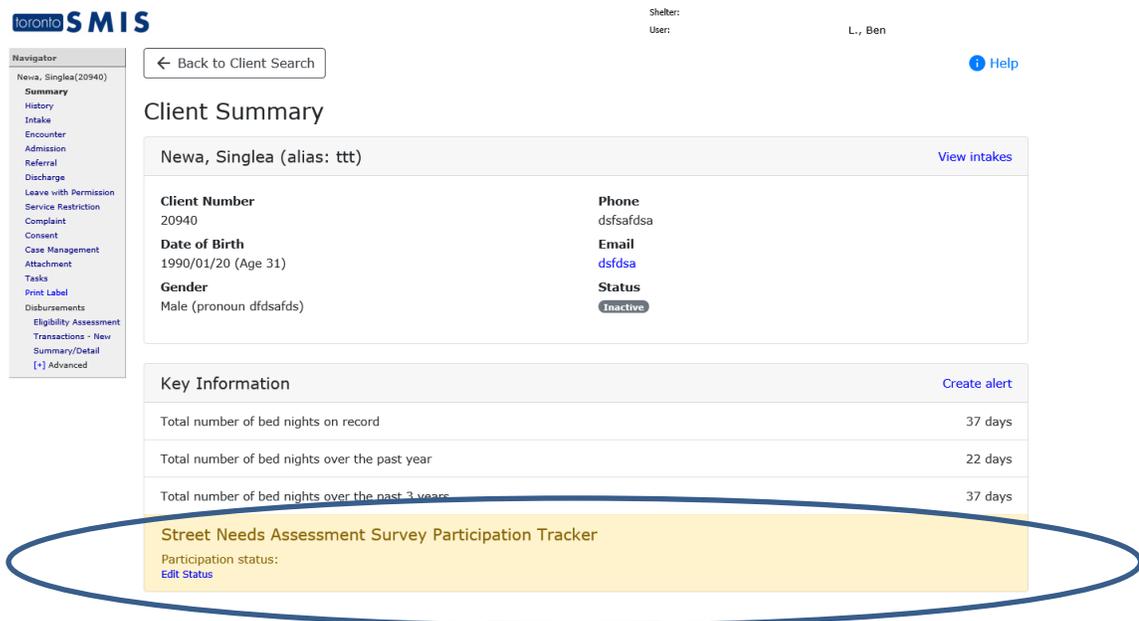
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General SMIS Changes

1. New Function: **Street Needs Assessment Participation Tracker**

A new "Street Needs Assessment Participation Tracker" has been added to the client summary screen for every client. This tool will help sites that are participating in the 2021 Street Needs Assessment track clients who have/have not participated in the survey. This tool will become available at the time of launch of the survey.

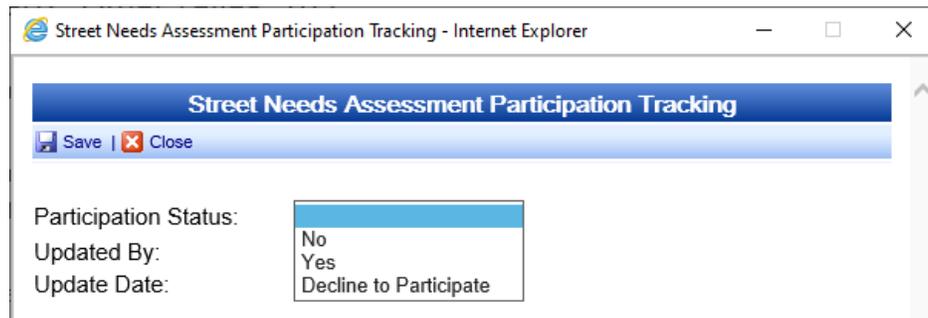
To record a client's participation, the user clicks the new **'Edit Status'** link in the yellow-coloured Street Needs Assessment Survey Participation Tracker.



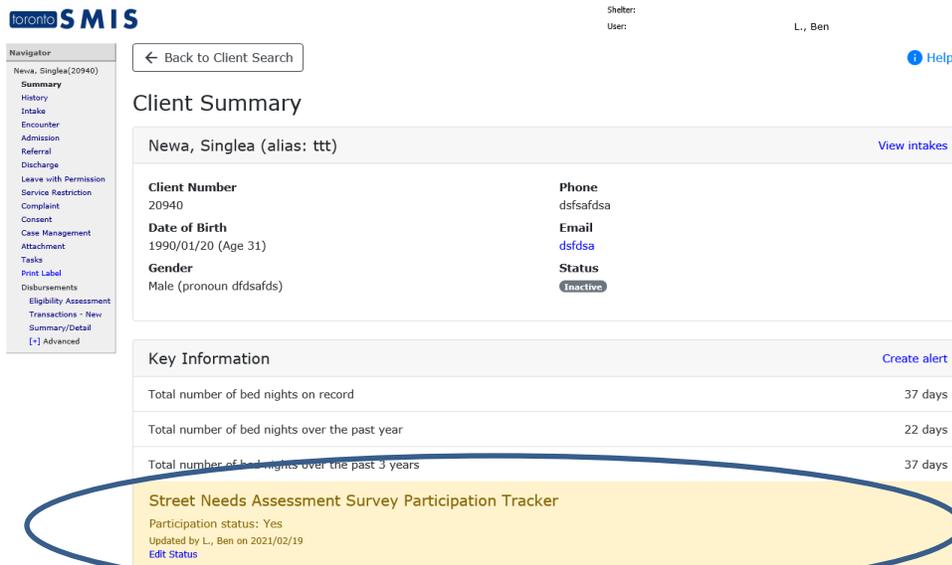
The screenshot shows the SMIS interface for a client named 'Newa, Singlea (alias: ttt)'. The page includes a sidebar with navigation options, a 'Back to Client Search' button, and a 'Help' icon. The main content area is titled 'Client Summary' and contains several sections:

- Client Information:** Client Number (20940), Date of Birth (1990/01/20 (Age 31)), Gender (Male (pronoun ddfsafds)), Phone (dfsafdsa), Email (dfsdfa), and Status (Inactive).
- Key Information:** Total number of bed nights on record (37 days), Total number of bed nights over the past year (22 days), and Total number of bed nights over the past 3 years (37 days).
- Street Needs Assessment Survey Participation Tracker:** A yellow-highlighted section containing the text 'Participation status:' and a blue link labeled 'Edit Status'.

To complete the tracker, the user clicks on [Edit Status](#) link. A pop-up window is displayed and the user should select a '**Participation Status**' from the dropdown list. Then, click on '**Save**' button.



In the Client Summary page, *Participation Status, Updated By [User Name] on [Current Date]* will be displayed. The participation status field can be edited by any user with access, even if field has already been completed. Also, the participation status can be changed to *Blank Status* and will be displayed with *Updated By and Date*.



Client Summary

Newa, Singlea (alias: ttt) [View intakes](#)

Client Number 20940	Phone dsfsafdsa
Date of Birth 1990/01/20 (Age 31)	Email dsfsda
Gender Male (pronoun ddfsafds)	Status Inactive

Key Information [Create alert](#)

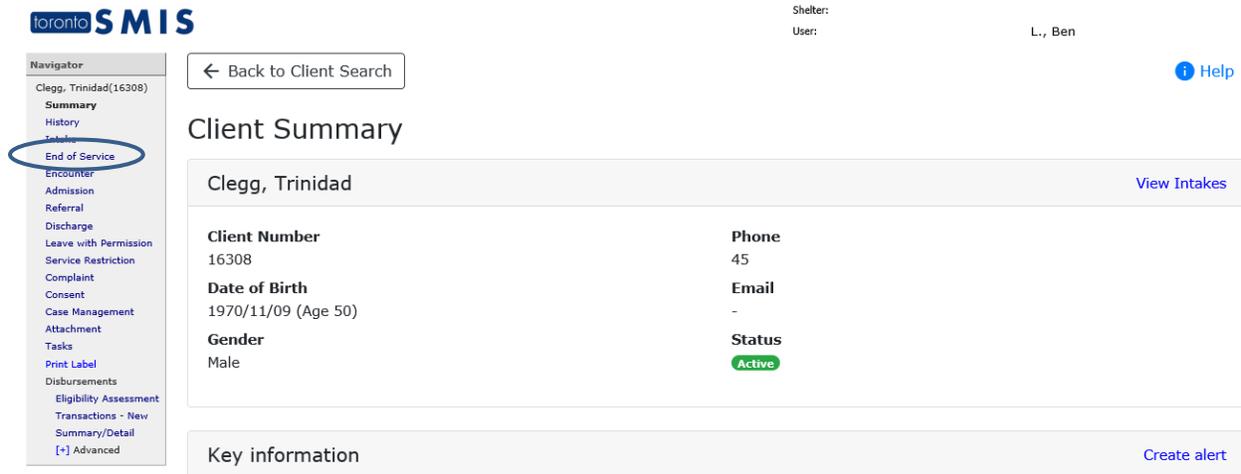
Total number of bed nights on record	37 days
Total number of bed nights over the past year	22 days
Total number of bed nights over the past 3 years	37 days

Street Needs Assessment Survey Participation Tracker

Participation status: Yes
Updated by L., Ben on 2021/02/19
[Edit Status](#)

2. New Function: End of Service for Service Programs

A new End-of-Service is now available for service programs to track housing outcomes for their clients. This module is used to close active intakes, similar to the way that bedded programs close their active intakes. This functionality will primarily be used by Street2Homes programs to end service for their clients in order to track housing outcomes. A new **"End of Service"** link has been added to the Client Navigator.



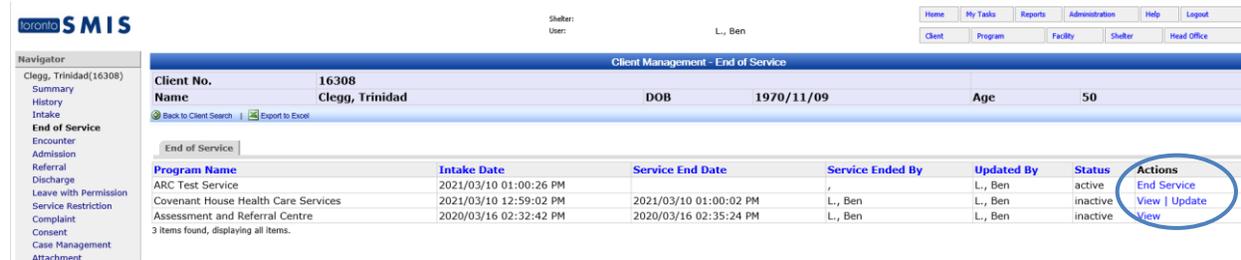
Client Summary

Clegg, Trinidad [View Intakes](#)

Client Number	16308	Phone	45
Date of Birth	1970/11/09 (Age 50)	Email	-
Gender	Male	Status	Active

Key information [Create alert](#)

When user clicks on this link, below page is displayed:



Client Management - End of Service

Client No.	16308	DOB	1970/11/09	Age	50
Name	Clegg, Trinidad				

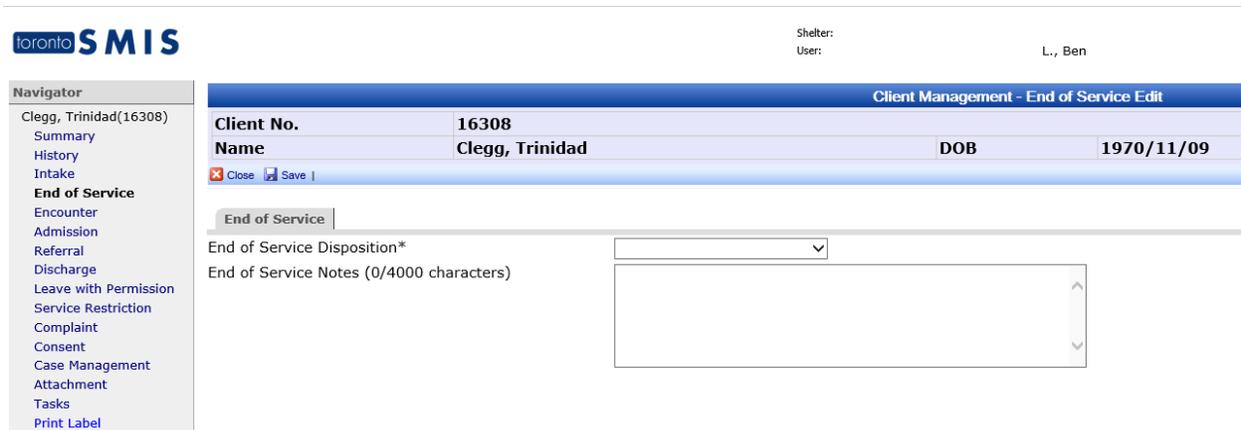
Program Name	Intake Date	Service End Date	Service Ended By	Updated By	Status	Actions
ARC Test Service	2021/03/10 01:00:26 PM			L, Ben	active	End Service
Covenant House Health Care Services	2021/03/10 12:59:02 PM	2021/03/10 01:00:02 PM	L, Ben	L, Ben	inactive	View Update
Assessment and Referral Centre	2020/03/16 02:32:42 PM	2020/03/16 02:35:24 PM	L, Ben	L, Ben	inactive	View

3 items found, displaying all items.

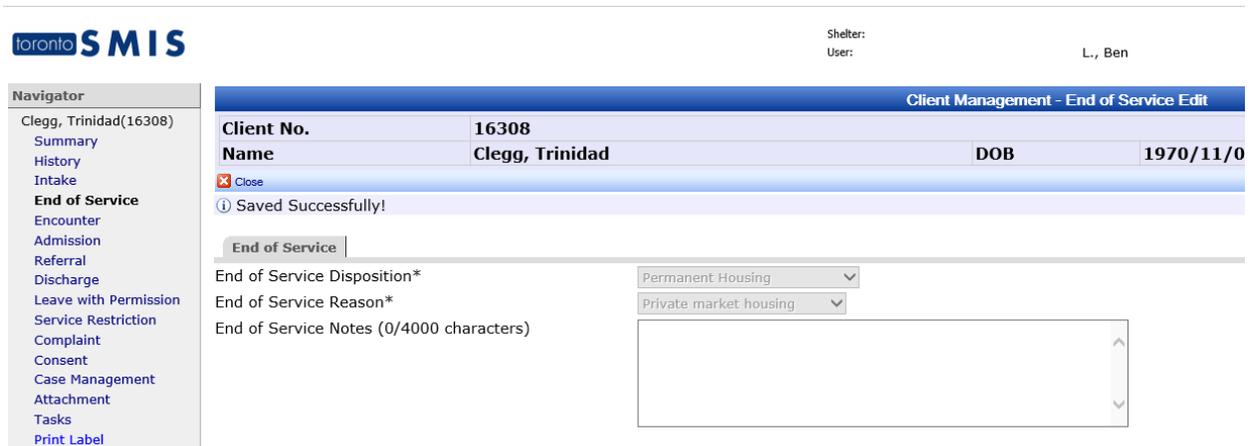
This page displays a listing of the client's end of service history records plus any current intakes for which service can be ended. Please note that intakes for bedded programs can be closed via the [discharge] page, while intakes for service programs can be closed via the [end of service] page.

The **"Action"** column shows actions that the user can take regarding each unique intake. This may include: [View](#) (this intake was closed 15+ days ago and can only be viewed as a historical record); [Update](#) (this intake was closed fewer than 14 days ago, so it can still be edited); and, [End Service](#) (this intake is active and can be closed). The user can click these action links to go the detailed End-of-Service screen.

The **"Client Management - End of Service Edit"** detailed screen looks like this:



User fill-in all mandatory fields and click on **"Save"** button.



User can edit the end-of-service record within the 14 days of the "Service End Date". Note that "Service Ended By" column is the user/staff who ended the service and "Updated By" column is the user/staff who last updated the end-of-service record within the 14 days.

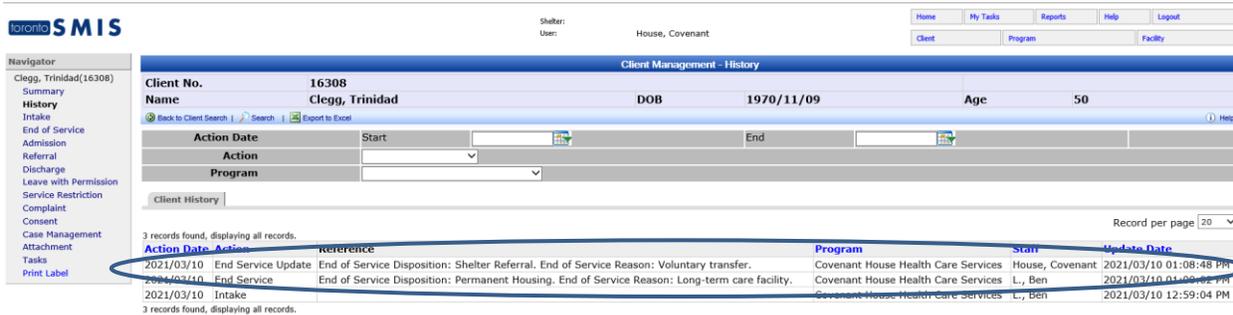


Client Management - End of Service

Client No. 16308
 Name Clegg, Trinidad DOB 1970/11/09 Age 50

Program Name	Intake Date	Service End Date	Service Ended By	Updated By	Status	Actions
ARC Test Service	2021/03/10 01:00:26 PM	2021/03/10 01:03:40 PM	L, Ben	L, Ben	inactive	View Update
Covenant House Health Care Services	2021/03/10 12:59:02 PM	2021/03/10 01:00:02 PM	L, Ben	House, Covenant	inactive	View Update
Assessment and Referral Centre	2020/03/16 02:32:42 PM	2020/03/16 02:35:24 PM	L, Ben	L, Ben	inactive	View

Also, new history records (End Service & End Service Update) have been added to the Client Management – History Listing page.



Client Management - History

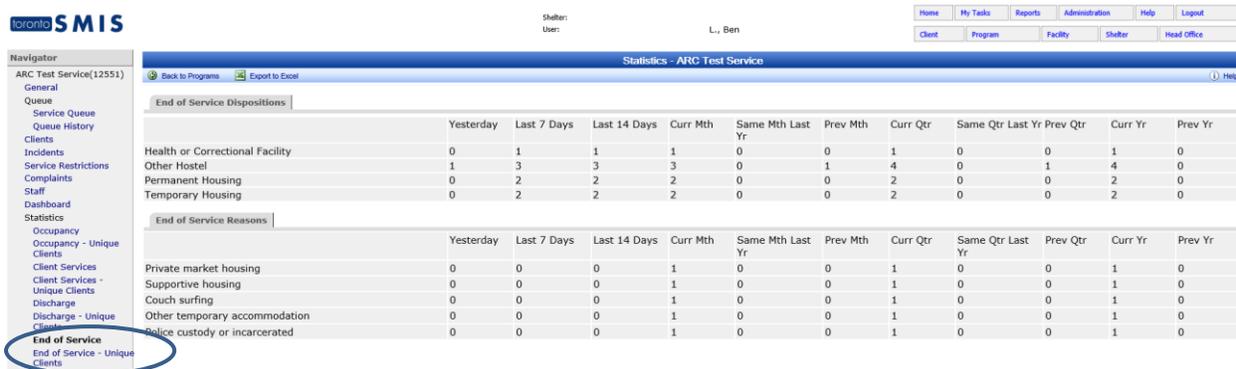
Client No. 16308
 Name Clegg, Trinidad DOB 1970/11/09 Age 50

Client History

Action Date	Action	Reference	Program	Status	Update Date
2021/03/10	End Service Update	End of Service Disposition: Shelter Referral. End of Service Reason: Voluntary transfer.	Covenant House Health Care Services	House, Covenant	2021/03/10 01:08:48 PM
2021/03/10	End Service	End of Service Disposition: Permanent Housing. End of Service Reason: Long-term care facility.	Covenant House Health Care Services	L, Ben	2021/03/10 01:08:02 PM
2021/03/10	Intake		Covenant House Health Care Services	L, Ben	2021/03/10 12:59:04 PM

3. New SMIS Pages: End-Of-Service and End-Of-Service Unique Clients Statistics

The "**End of Service**" and "**End of Service Unique – Clients**" Statistics screens has been added to the Program, Facility, Shelter and Head Office Navigators as options.



The screenshot shows the SMIS interface with a sidebar on the left containing a menu where 'End of Service' and 'End of Service - Unique Clients' are circled. The main content area displays two tables under the heading 'Statistics - ARC Test Service'.

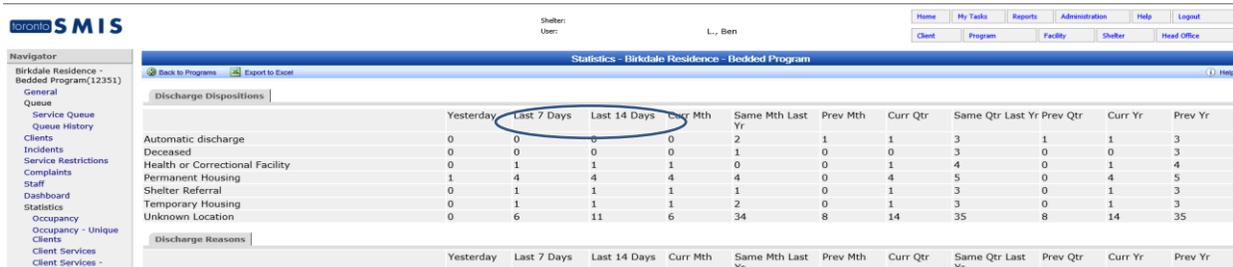
End of Service Dispositions											
	Yesterday	Last 7 Days	Last 14 Days	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Health or Correctional Facility	0	1	1	1	0	0	1	0	0	1	0
Other Hostel	1	3	3	3	0	1	4	0	1	4	0
Permanent Housing	0	2	2	2	0	0	2	0	0	2	0
Temporary Housing	0	2	2	2	0	0	2	0	0	2	0

End of Service Reasons											
	Yesterday	Last 7 Days	Last 14 Days	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Private market housing	0	0	0	1	0	0	1	0	0	1	0
Supportive housing	0	0	0	1	0	0	1	0	0	1	0
Couch surfing	0	0	0	1	0	0	1	0	0	1	0
Other temporary accommodation	0	0	0	1	0	0	1	0	0	1	0
Police custody or incarcerated	0	0	0	1	0	0	1	0	0	1	0

Each of these screens contains two tabs: "**End of Service Dispositions**" and "**End of Service Reasons**" and the columns in each tab has the same column as Discharge statistics screens with the addition of the new "**Last 7 Days**" and "**Last 14 Days**" columns inserted to the right of the "**Yesterday**" column.

4. Added "Last 7 Days" and "Last 14 Days" Columns to the 'Discharge' and 'End-of-Service' Statistics

Two new columns reading **"Last 7 Days"** and **"Last 14 Days"** have been added to the Discharge and Discharge – Unique Clients Statistics screens for Program, Facility, Shelter, and Head office levels.



	Yesterday	Last 7 Days	Last 14 Days	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Last Yr	Prev Qtr	Curr Yr	Prev Yr
Automatic discharge	0	0	0	0	2	1	1	3	1	1	3
Deceased	0	0	0	0	1	0	0	3	0	0	3
Health or Correctional Facility	0	1	1	1	0	0	1	4	0	1	4
Permanent Housing	1	4	4	4	4	0	4	5	0	4	5
Shelter Referral	0	1	1	1	1	0	1	3	0	1	3
Temporary Housing	0	1	1	1	2	0	1	3	0	1	3
Unknown Location	0	6	11	6	34	8	14	35	8	14	35

5. Added new Columns in the Admission and Discharge Screens

New columns have been added to the Admission, Discharge, and End-of Service List screens, including:

In the Admission screen:

1. Admitted by – the staff who admitted the client
2. Last Updated by – the staff who last updated the admission record

In the Discharge screen:

1. Discharged by – the staff who discharged the client
2. Last Updated by – the staff who last updated the discharge record within the 14 days



Program Name	Admission Date	Discharge Date	Discharged By	Updated By	Status	Actions
Birkdale Residence - Bedded Program	2021/03/09 09:27:24 AM	2021/03/09 09:31:00 AM	birkdale, supervisor	birkdale, cw	discharged	View Update



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Changes to the SMIS Intake Form

Important Note the changes described in this section refer only to the "New Triage Intake Form". Currently, only 12 sites are piloting this form. All other sites that conduct intake will soon have access to this form, once the necessary training has been provided. Please expect to see these changes in early spring, 2021. You will receive training as well as notification from the City and from your management, prior to these changes taking effect.

6. Added the ability to print the intake form as a PDF

A new "**print**" button has been added to the Client New Intake screen. The user has the ability to print a blank version of the Client New Intake Form in a pdf file format.

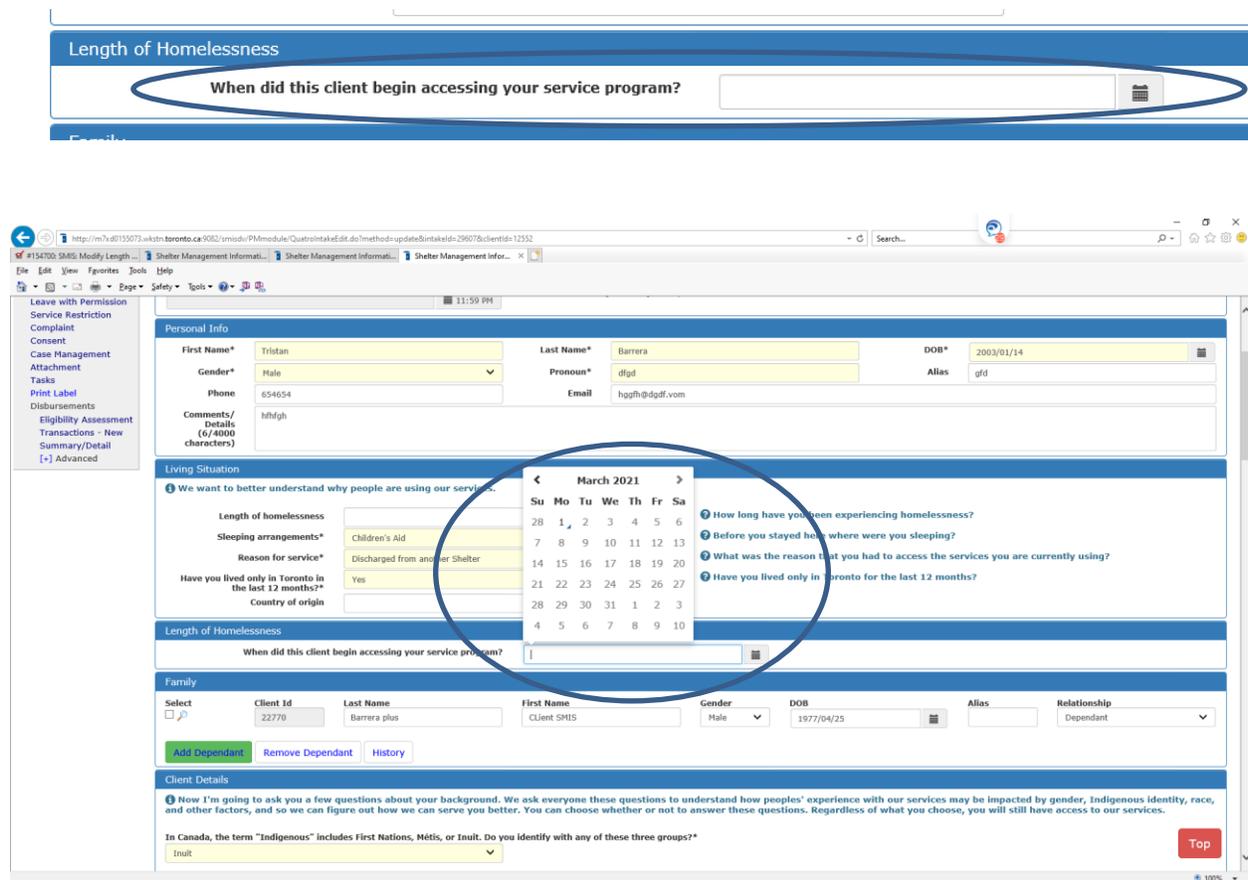
Below is a sample screenshot of the Intake screen:



If user clicks on "**Print blank form**", a pop-up window will be displayed.

service program?". The purpose of this field is to identify when a client started accessing a user's program. This is primarily used by service programs that do not admit their clients to a bed, and therefore do not have bed nights.

Below are sample screenshots of the Intake screen:



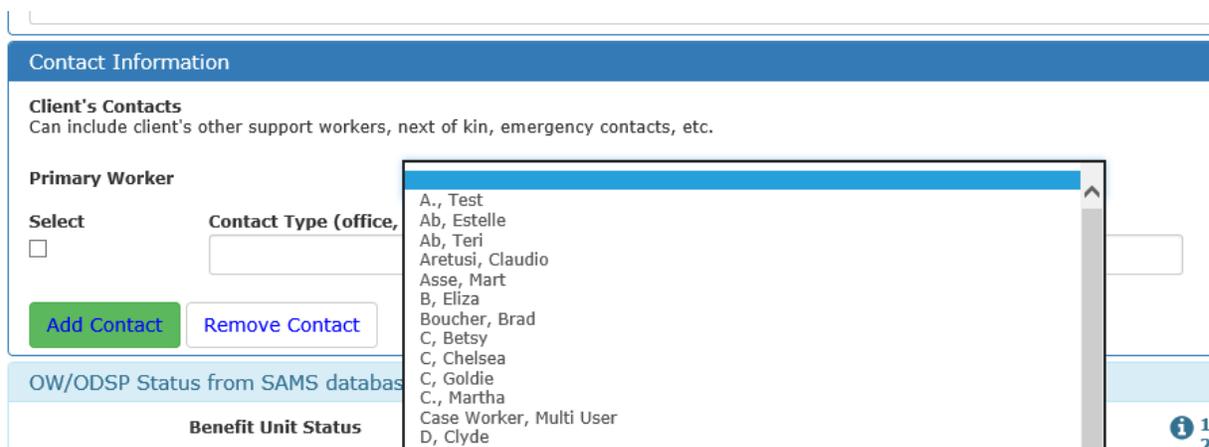
For Program Administrators, if this field is not applicable to your program (e.g. shelters), you can disable this section by going to the [Edit Program Screen], and selecting 'No' to the toggle for this section.

Show Client Details	Yes ▾
Show Support Needs	Yes ▾
Show Housing Essentials	Yes ▾
Show Client Contacts	Yes ▾
Show Benefit Status	Yes ▾
Show Length of Homelessness	Yes ▾

10. New Field: Add a "Primary Worker"

A new '**Primary Worker**' field has been added to the [Client Contacts] section. This field is a searchable dropdown list for all SMIS users.

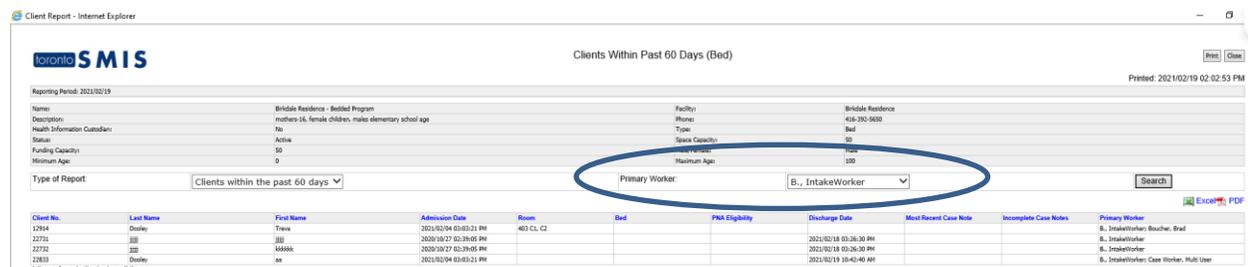
Below is a sample screenshot:



When a primary worker is selected in this field, this worker will appear up in the **Client Reports** in **Program Management**, **Facility Management** and **Shelter Management** for that program. This can be used to filter these Client Reports. Note that if a client has a primary worker listed in both the intake form and the admissions module, the report will display both names.

Below are the sample Client Reports.

Program Management > Client Report



Facility Management > Client Report

Client Report - Internet Explorer

Facility Active Clients

Reporting Period: 2021/02/19 Print Close

Printed: 2021/02/19 02:01:12 PM

Name: Brinkley Residence
 Description: mothers and children
 Sector: Families
 Status: Active

Shelter: Brinkley Residence
 Area: 00000000
 Contact: 416-393-3713
 Phone:
 Health Information:

Type of Report: Active Clients
 Program: Any

Primary Worker: Boucher, Brad Search

Program	Client No.	Last Name	First Name	Never Expired	Intake Status	Last Intake/ Admission Date	Room	Bed	PMA Eligibility	End Discharge Date	Most Recent Case Note	Incomplete Case Note	Primary Worker
Brinkley Residence - Bedded Program	12914	Doolley	Theresa	Yes	admitted	2021/02/04 03:03:21 PM	403 CL C2						B. IntakeWorker Boucher, Brad
Brinkley Residence - Bedded Program	22834	ir	is		admitted	2021/02/05 09:12:15 AM	HqJed						Boucher, Brad

2 Items found, displaying all items.

Shelter Management > Client Report

Client Report - Internet Explorer

Shelter Active Clients

Reporting Period: 2021/02/19 Print Close

Printed: 2021/02/19 02:03:17 PM

Shelter: Brinkley Residence
 Description: mothers and children refugee claimants
 Type: Active
 Status: Active

Organization: City of Toronto
 Contact: Anne Duggan
 Phone: 416-393-9033

Type of Report: Active Clients
 Program: Any

Primary Worker: Any
L.I.L.L., C.Ttt
B. IntakeWorker
Boucher, Brad
H. Milice Search

Program	Client No.	Last Name	First Name	Never Expired	Intake Status	Last Intake/ Admission Date	Room	Bed	PMA Eligibility	End Discharge Date	Most Recent Case Note	Incomplete Case Note	Primary Worker
Brinkley Residence - Bedded Program	12914	Doolley	Theresa	Yes	admitted	2021/02/04 03:03:21 PM	403 CL C2						B. IntakeWorker Boucher, Brad
Brinkley Residence - Outreach Program	16705	Hart	Tracy	Yes	active	2021/01/29 03:48:05 PM							
Brinkley Residence - Bedded Program	20622	ir	is		admitted	2021/02/05 09:11:31 AM	HqJed						L.I.L.L., C.Ttt
Brinkley Residence - Outreach Program	21571	Hart	Tracy	Yes	active	2021/02/29 03:48:07 PM							
Brinkley Residence - Bedded Program	22834	ir	is		admitted	2021/02/05 09:12:15 AM	HqJed						Boucher, Brad

5 Items found, displaying all items.

11. Revised the taxation field

The Taxation field has been completely revised. It now asks "***What was the last taxation year that you filed for?***" Users can only enter a 4-digit number (year) in this field, and the year must be prior to the current year at most (e.g., 2021-1).

Housing Essentials

What are your sources of income right now?* (Select all that apply)

<input type="checkbox"/> Assets	<input checked="" type="checkbox"/> CPP	<input type="checkbox"/> CPPD
<input type="checkbox"/> Child Support	<input type="checkbox"/> Child Tax Benefit	<input type="checkbox"/> Employment
<input type="checkbox"/> Employment Insurance	<input type="checkbox"/> GIS	<input type="checkbox"/> None Declared
<input type="checkbox"/> ODSP	<input type="checkbox"/> OSAP	<input type="checkbox"/> Old Age Security
<input type="checkbox"/> Ontario Works (OW)	<input type="checkbox"/> PNA	<input type="checkbox"/> Savings
<input type="checkbox"/> WSIB	<input type="checkbox"/> Other, please specify <input style="width: 150px;" type="text"/>	

Estimated monthly income

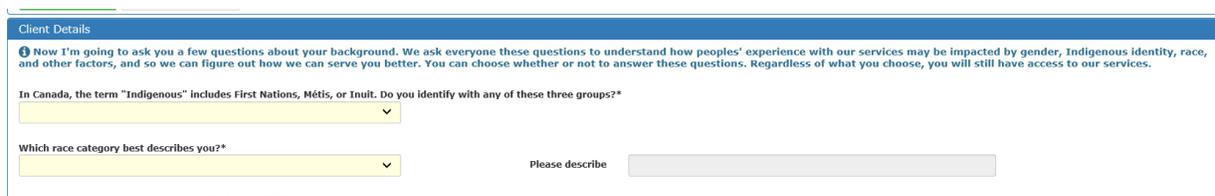
What was the last taxation year that you filed for?

Year:

12. Updated the Descriptive Text in the [Client Details] section

The current blue descriptive text in the [Client Details] section has been changed from *"We ask the following questions to tailor our services better for you, if possible"* to *"Now I'm going to ask you a few questions about your background. We ask everyone these questions to understand how peoples' experience with our services may be impacted by gender, Indigenous identity, race, and other factors, and so we can figure out how we serve you better. You can choose whether or not to answer these questions. Regardless of what you choose, you will still have access to our services"*.

Below is a sample screenshot:



The screenshot shows a form titled "Client Details" with the following content:

Client Details

i Now I'm going to ask you a few questions about your background. We ask everyone these questions to understand how peoples' experience with our services may be impacted by gender, Indigenous identity, race, and other factors, and so we can figure out how we can serve you better. You can choose whether or not to answer these questions. Regardless of what you choose, you will still have access to our services.

In Canada, the term "Indigenous" includes First Nations, Métis, or Inuit. Do you identify with any of these three groups?*

Which race category best describes you?*

Please describe

13. Revised the title for [Housing Connections] in the [Housing Applications] section

The title "~~Housing Connections~~" in the [Housing Applications] section has been changed to "**Access to Housing**".

14. Substantially revised the [Housing Applications] section

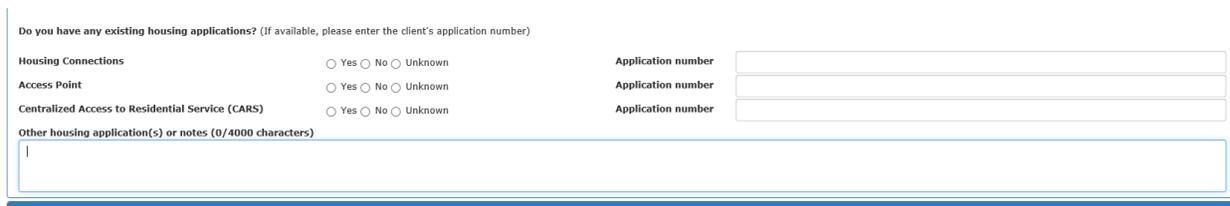
A number of major changes have been made to the [Housing Applications] Section including:

a) An **[Add] Applications button** and a **[Remove] Applications button** have been added to the [Housing Applications] section, allowing users to add customizable additional rows. The user can add as many additional applications as are necessary for each client. Likewise, these additional applications can be removed, if needed. The three core applications (Access to Housing, Access Point, Centralized Access to Residential Services (CARS)) cannot be removed.

b) The headers for each column have also been revised:

- "Application" is a mandatory field to indicate the name/type of application
- "Exists?" is a drop-down field to indicate whether the application exists (yes, no, unknown)
- "Application number" is an open-text field to indicate the application number
- "Notes" is now available for each application type to provide detail specific to that application.

For reference, below is a sample screenshot before the changes:



Do you have any existing housing applications? (If available, please enter the client's application number)

Housing Connections	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown	Application number	<input type="text"/>
Access Point	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown	Application number	<input type="text"/>
Centralized Access to Residential Service (CARS)	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown	Application number	<input type="text"/>

Other housing application(s) or notes (0/4000 characters)

Below is a sample screenshot after the changes:

Do you have any existing housing applications? (If available, please enter the client's application number)

Housing Applications

Applications **4**

Select	Application (*)	Exists?	Application number	Notes (0/255 characters)
<input type="checkbox"/>	Housing Connections	Yes	A4657468	contact Access to Housing directly re...
<input type="checkbox"/>	Access Point	No		
<input type="checkbox"/>	Centralized Access to Residential Service (CAR)	Unknown		not sure of App # either will follow-up on April 2, 2021
<input type="checkbox"/>	Housing First	Yes	24234234	pending avail of suite.

15. Updated Link: Support Assessment Guide

The link "**supports assessment guide**" has been updated in the [Support Needs] Section.

Getting to know your needs

When you are ready, we'd like to understand your needs so we can serve you better. Please complete any remaining questions in the next 7 days.

Support Needs

I'm going to ask about support needs you may have. If you feel comfortable, please share your support needs in any of the following areas: Please see the [supports assessment guide](#) on how to ask these questions.

Health & Wellness <input checked="" type="checkbox"/> Allergies or dietary restrictions	Accessibility <input type="checkbox"/> Limited mobility	Oth <input type="checkbox"/>
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When user clicks on this link, a pop-up window will be displayed and file is in a pdf format

dv/lookup/lookupCodeList.do?method=doViewAttachmen - Internet Explorer

Supports Assessment Guide (Pilot)

For the pilot of the SMIS/STARSS-A Unified Intake version 1.0

Version date: October 20, 2020

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16. Substantially revised the [Support Needs] section

A number of major changes have been made to the [Support Needs] section including:

- a) The title "~~Level of supports required~~" in the Support Needs section of the Client Intake Form has been changed to "**Triage: Recommended Level of Supports**".
- b) The '**Not sure**' option has been removed from the [Triage: Recommended Level of Supports] field, as this is a non-mandatory field.
- c) The order of the Level of [Triage: Recommended Level of Supports] field has been reversed from '~~high, medium, low~~' to 'low, medium, high'.
- d) The descriptive text for each of the three options in the [Triage: Recommended Level of Supports] field has been modified to provide more information to the user.

Below is a sample screenshot before the changes:

Level of supports required
To be completed by staff.

High

- Has at least one of a physical health, mental health, or substance use concern
- Has been homeless for longer than 1 year
- Or is between the ages of 16 and 24, with one or both of the above

Medium

- May have been homeless for 6-12 months
- Is between the ages of 16 and 24, and does not otherwise meet the criteria for high supports
- May have at least one of a physical health, mental health, or substance use concern

Low

- No physical health, mental health, or substance use supports required

Not sure

Below is a sample screenshot after the changes:



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Triage: Recommended Level of Supports

To be completed by staff.

Low

- Client has few support needs and does not require much assistance to find or maintain housing.
- Client able self-manage any mental health, physical health, or substance use issues.
- The client has likely been homeless for less than 6 months.
- The client is 25 years old or older.

Medium

- The client needs some assistance from staff to find housing and connect with supports.
- The client may have challenges with mental health, physical health, substance use, or other challenges that may impact their ability to access services and find and maintain housing on their own.
- The client may require some staff assistance with reading, doing paperwork, communicating, or translation.
- The client may have been homeless for longer than 6 months.

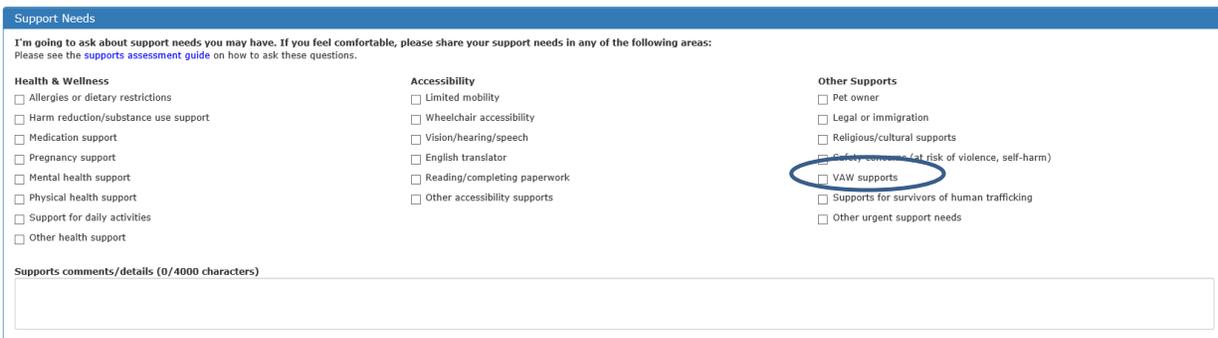
High

- The client needs intensive assistance from staff to find and maintain housing and connect with supports.
- "Mental health" and/or "substance use" is checked off, with one or more additional items checked off that seem likely to impact the client's ability to access services, and find housing and maintain housing on their own. The client may need assistance with daily activities.
- Once housed, the client will likely need a higher level of case management follow-up supports, or they may require ongoing on-site supports.
- The client may have been homeless for longer than 1 year.

17. Added a "VAW Support" checkbox option to [Support Needs > Health & Wellness] section

A new "**VAW support**" checkbox option has been added to the [Support Needs > Health & Wellness] section.

Below is a sample screenshot of the Intake screen:



Support Needs

I'm going to ask about support needs you may have. If you feel comfortable, please share your support needs in any of the following areas:
Please see the [supports assessment guide](#) on how to ask these questions.

Health & Wellness	Accessibility	Other Supports
<input type="checkbox"/> Allergies or dietary restrictions	<input type="checkbox"/> Limited mobility	<input type="checkbox"/> Pet owner
<input type="checkbox"/> Harm reduction/substance use support	<input type="checkbox"/> Wheelchair accessibility	<input type="checkbox"/> Legal or immigration
<input type="checkbox"/> Medication support	<input type="checkbox"/> Vision/hearing/speech	<input type="checkbox"/> Religious/cultural supports
<input type="checkbox"/> Pregnancy support	<input type="checkbox"/> English translator	<input type="checkbox"/> Safety concerns (at risk of violence, self-harm)
<input type="checkbox"/> Mental health support	<input type="checkbox"/> Reading/completing paperwork	<input type="checkbox"/> VAW supports
<input type="checkbox"/> Physical health support	<input type="checkbox"/> Other accessibility supports	<input type="checkbox"/> Supports for survivors of human trafficking
<input type="checkbox"/> Support for daily activities		<input type="checkbox"/> Other urgent support needs
<input type="checkbox"/> Other health support		

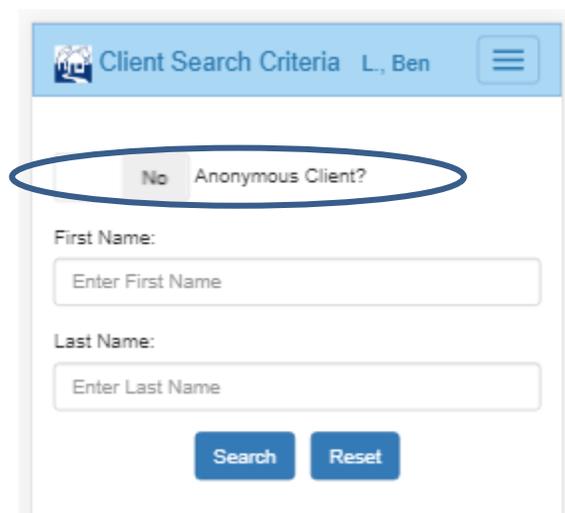
Supports comments/details (0/4000 characters)

Changes to the SMIS Mobile Application (Only Applicable to City-Operated S2H Programs)

18. New Function: Capturing Anonymous Clients Data in SMIS Mobile

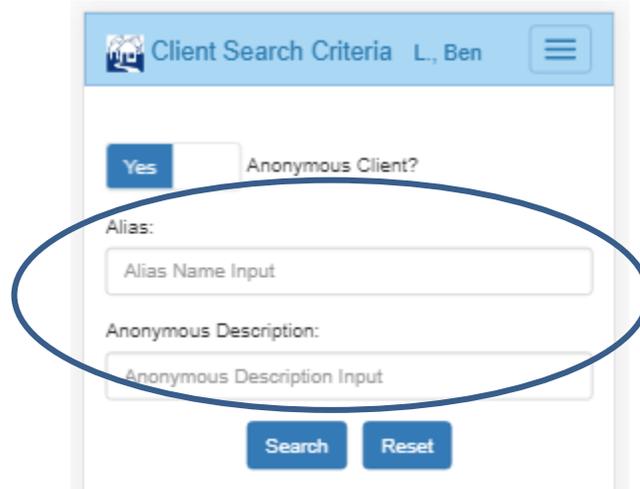
Anonymous Clients can now be captured using the Mobile SMIS application. These clients will have unique "**Anonymous IDs**" that are separate from the "SMIS Client IDs". Please note that this application is **only** available to City-operated S2H programs at this time.

Users can create these Anonymous Clients in the same way that they currently create Known clients, by first searching for a client. An "**Anonymous Client?**" toggle button has been added to the Client Search screen for users to create and search the anonymous clients.

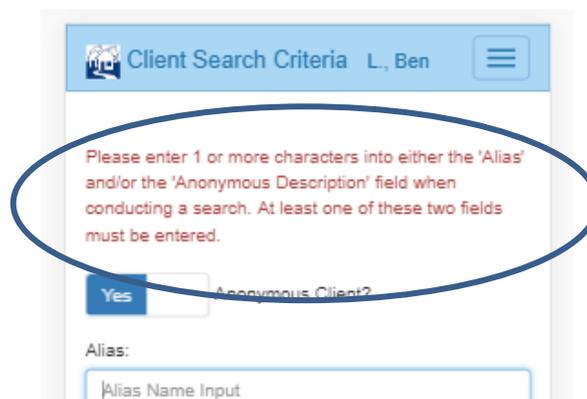


When the user sets this toggle button to '**No**', they will be prompted to search for a client by first name and last name, per usual.

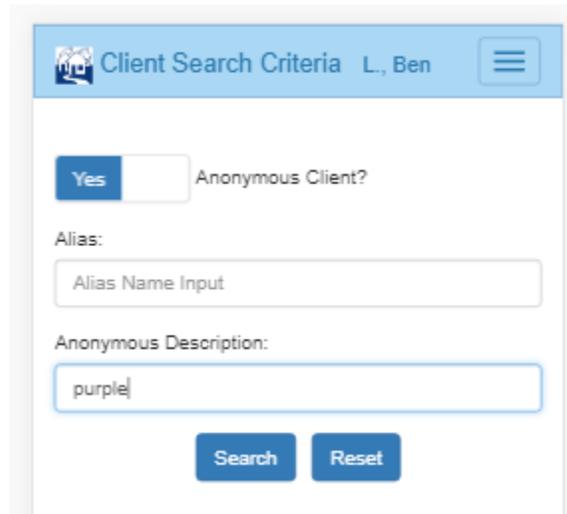
When the user sets this toggle button to '**Yes**', *Alias* and *Anonymous Description* fields will be displayed instead of the first name and last name fields.



To search for an anonymous client, enter values into either 'Alias' and/or 'Anonymous Description'. An error message will be displayed if both fields are empty.



Example: Enter '**purple**' in the *Anonymous Description* field and click the '**Search**' button.



Client Search Criteria L., Ben

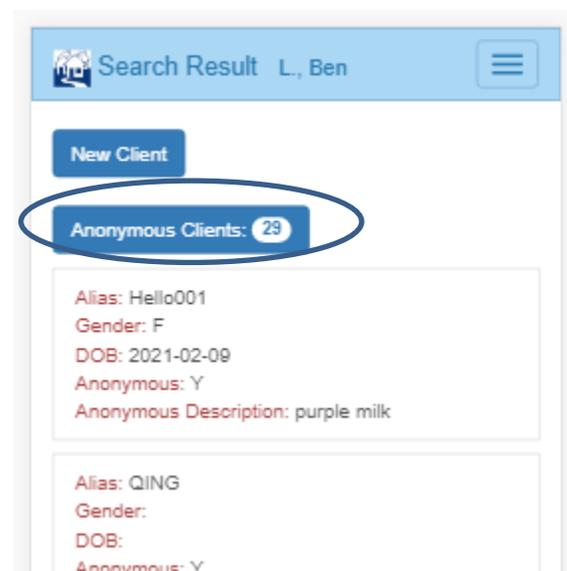
Anonymous Client?

Alias:
Alias Name Input

Anonymous Description:
purple

Search Reset

Below search results will be displayed. A total count of anonymous clients that matched the description is displayed at the top of the screen.



Search Result L., Ben

New Client

Anonymous Clients: 29

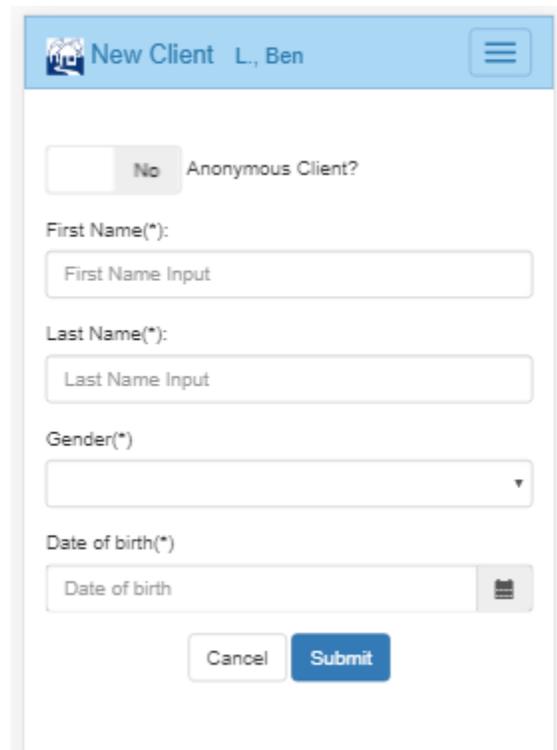
Alias: Hello001
Gender: F
DOB: 2021-02-09
Anonymous: Y
Anonymous Description: purple milk

Alias: QING
Gender:
DOB:
Anonymous: Y

To create a new anonymous client, user clicks on the



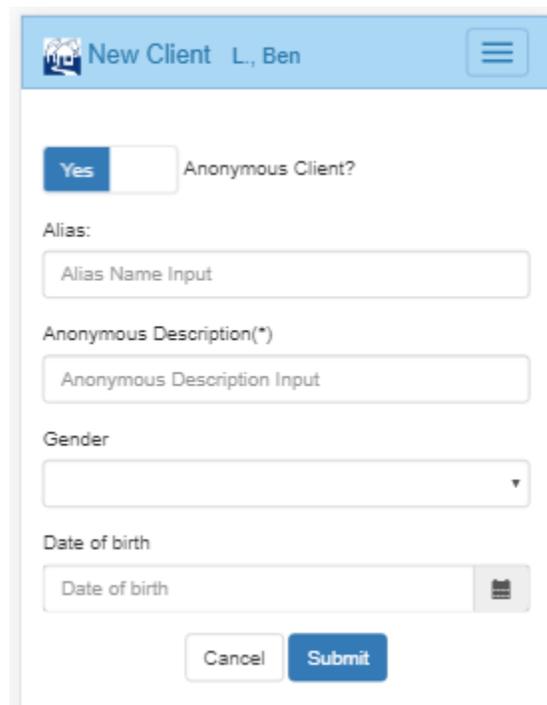
button and the **'New Client'** screen will be displayed.



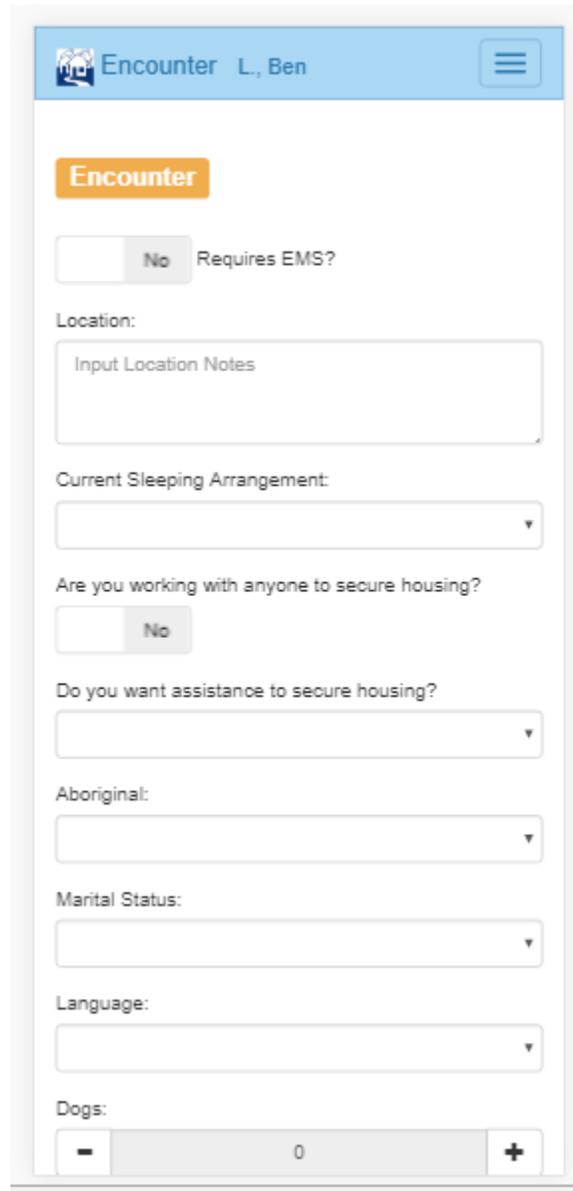
The screenshot shows a mobile application interface for creating a new client. At the top, there is a blue header bar with the text "New Client L., Ben" and a menu icon. Below the header, there is a toggle switch for "Anonymous Client?" which is currently set to "No". The form contains several input fields: "First Name(*)" with a text input field containing "First Name Input", "Last Name(*)" with a text input field containing "Last Name Input", "Gender(*)" with a dropdown menu, and "Date of birth(*)" with a date picker input field containing "Date of birth". At the bottom of the form, there are two buttons: "Cancel" and "Submit".

If the user sets the Anonymous Client toggle button to '**No**', they can create a known client, per usual.

If the user sets the Anonymous Client toggle button to '**Yes**', they can create an anonymous client. *Alias*, *Gender* and *Date of Birth* fields are optional and *Anonymous Description* field is mandatory for users. Users should refer to the instructions provided by their managers regarding information that should be entered to the 'Anonymous Description' field.



When user fills in all the fields and clicks on the  button, the '**Encounter**' screen will be displayed.



Encounter L, Ben

Encounter

No Requires EMS?

Location:

Current Sleeping Arrangement:

Are you working with anyone to secure housing?
 No

Do you want assistance to secure housing?

Aboriginal:

Marital Status:

Language:

Dogs:

Also, the user can create multiple encounters for each anonymous client, similar to the process for known clients.

Return

Client No: 22992
 Active: No
 Alias: FR
 Gender: F
 DOB: 1978/01/01
 Anonymous: Y
 Anonymous Description: red brown bag

Family

Current Program

History

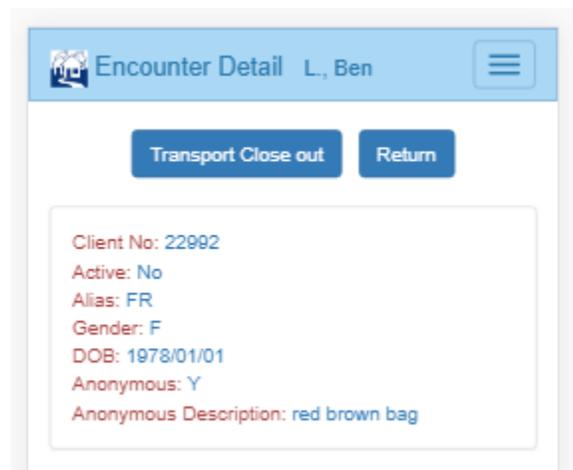
Encounter

Encounter Date: 2021/02/18 04:44 PM (Reviews: 1)
 Last Update Date: 2021/02/18 04:44 PM
 Status: S2H Transporting
 Encounter Type: Initial Assessment
 Notes: dg
 Location Notes: dgdf

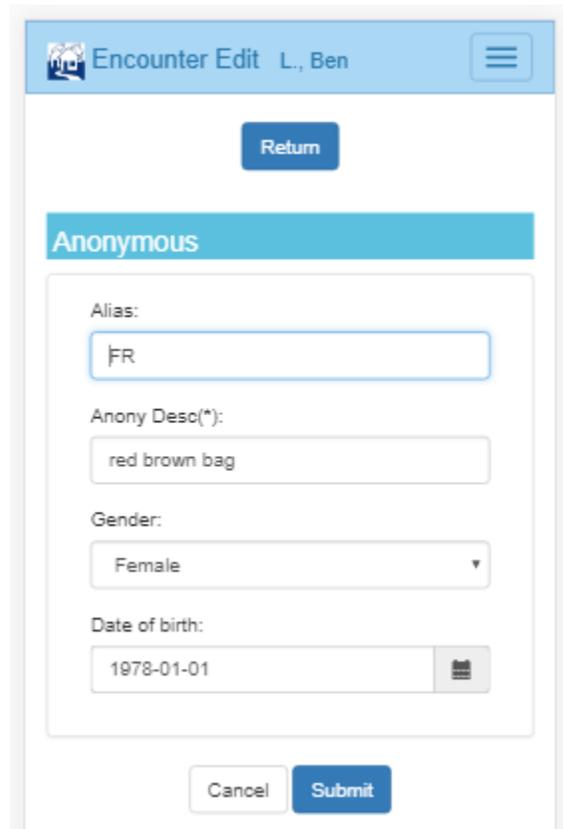
Encounter Date: 2021/02/18 04:43 PM (Reviews: 2)
 Last Update Date: 2021/02/18 04:43 PM
 Status: Closed
 Encounter Type: EMS Assessment
 Location Notes: hgjjhgjg

User may be able to edit the client's demographics (i.e. alias, anonymous description, gender and date of birth) of existing anonymous clients and clients without active or inactive intakes in SMIS and clients should have existing encounters as well to be able to edit.

When user clicks on '**Client Info**' section,



Encounter Edit screen will be displayed and user can edit the fields.



Encounter Edit L., Ben

Return

Anonymous

Alias:

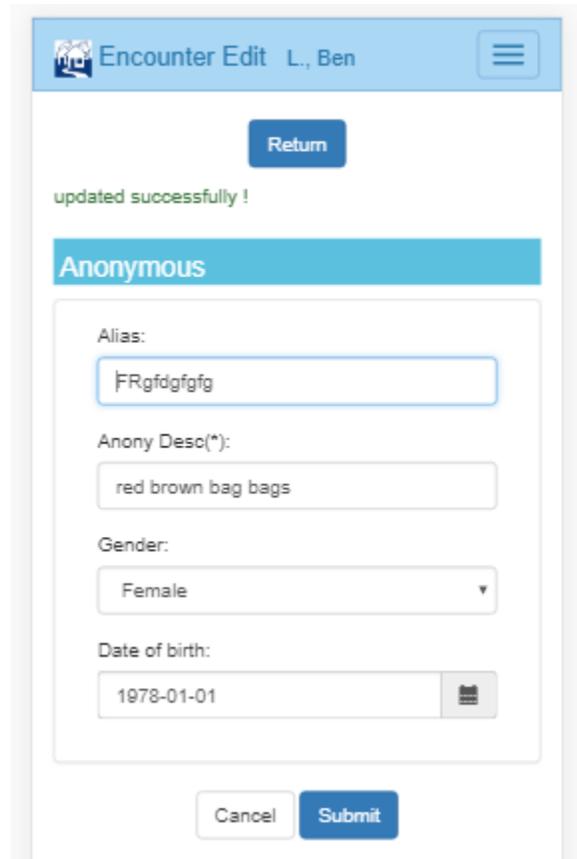
Anony Desc(*):

Gender:

Date of birth:

Cancel Submit

Then, user clicks on '**Submit**' button to save the changes. A message is displayed "**updated successfully**".



Encounter Edit L., Ben

Return

updated successfully !

Anonymous

Alias:
FRgfdgfg

Anony Desc(*):
red brown bag bags

Gender:
Female

Date of birth:
1978-01-01

Cancel Submit

In the **Active Encounters List** screen, anonymous clients will be displayed with *Alias* and *Anonymous Description*. Also, a new '**Anonymous**' label has been added to the Active Encounters List screen to differentiate anonymous and non-anonymous clients.

<p>Status: Awaiting EMS Encounter Type: Initial Assessment EMS Note: gsdg Location Notes: gsdg</p>
<p>Alias: gg Anonymous: Yes Anonymous Description: purple sleeping bag Encounter Date: 2021/02/08 05:25 PM (Reviews: 2)</p>
<p>Last Update Date: 2021/02/09 09:29 PM Status: Follow-Up Encounter Type: EMS Assessment Follow Up Notes: fasdf Location Notes: fasdf</p>
<p>Alias: QING Anonymous: Yes Anonymous Description: purple sleeping bag Encounter Date: 2021/02/08 05:54 PM (Reviews: 1) Last Update Date: 2021/02/08 05:54 PM Status: Awaiting EMS Encounter Type: Initial Assessment EMS Note: dasd Location Notes: afsdf</p>
<p>Name: gggggggg gggggggggg Anonymous: No Encounter Date: 2021/02/08 08:03 PM (Reviews: 1) Last Update Date: 2021/02/08 08:03 PM Status: Awaiting EMS Encounter Type: Initial Assessment EMS Note: fasdf Location Notes: fasdf</p>
<p>Name: gggg gggg Anonymous: No Encounter Date: 2021/02/09 07:02 AM (Reviews: 2)</p>