

Version 3.5 April 2021

This documents 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 <u>http://www.toronto.ca/housing/smis/smisuser.htm</u>





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Enhancements:

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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 yellowcoloured Street Needs Assessment Survey Participation Tracker.

	5	Shelter: User:	L., Ben	
Navigator	← Back to Client Search		😗 Help	
Summary History Intake Encounter	Client Summary			
Admission Referral	Newa, Singlea (alias: ttt)		View intakes	
Discharge Leave with Permission Service Restriction Complaint Case Management Attachment Tasks Print Label Disbursements Eligibility Assessment Transactions - New	Client Number 20940 Date of Birth 1990/01/20 (Age 31) Gender Male (pronoun dfdsafds)	Phone dsfsafdsa Email dsfdsa Status (nactive)		
[+] Advanced	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 Pa Participation status: Edit Status	rticipation Tracker		>





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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.

Street Needs Assessment Page	nticipation Tracking - Internet Explorer		—	Х
Street N 🚽 Save 🔀 Close	leeds Assessment Participatio	n Tracking		^
Participation Status: Updated By: Update Date:	No Yes Decline to Participate			

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.

	S	Shelter: User:	L., Ben
Navigator Newa, Singlea(20940) Summary History Intake Ecounter	← Back to Client Search		1 Help
Admission Referral	Newa, Singlea (alias: ttt)		View intakes
Discharge Leave with Permission Service Restriction Consent Case Management Attachment Tasks Print Label Disbursements Eligibility Assessment Transactions - New Summary/Detail	Client Number 20940 Date of Birth 1990/01/20 (Age 31) Gender Male (pronoun dfdsafds)	Phone dsfsafdsa Email dsfdsa Status Inscrive	
[+] Advanced	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 bool signes over the past 3 years		37 days
<	Street Needs Assessment Survey Part Participation status: Yes Updated by L, Ben on 2021/02/19 Edit Status	ticipation Tracker	\supset





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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.

toronto SMI	5	Shelter: User:	L., Ben
Navigator Clegg, Trinidad(16308)	← Back to Client Search		🚯 Help
Summary History End of Service	Client Summary		
Encounter Admission Referral	Clegg, Trinidad		View Intakes
Discharge Leave with Permission Service Restriction Complaint Cossent Case Management Attachment Tasks Print Label Disbursements Eligibility Assessment Transactions - New	Client Number 16308 Date of Birth 1970/11/09 (Age 50) Gender Male	Phone 45 Email - Status Active	
Summary/Detail [+] Advanced	Key information		Create alert

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

			Sheker: User:	L., Ben	1	Home	My Tasks Program	Reports	Administration cility Sh	Help elter	Logout Head Office	
Navigator				Client Management - End of	f Service							
Clegg, Trinidad(16308) Summary	Client No.	16308										
History	Name	Clegg, Trinidad		DOB	1970/11/09		Age		50			
Intake	Back to Client Search Keyport to E	Excel										
End of Service Encounter Admission	End of Service											
Referral	Program Name		Intake Date	Service End Date	Service Ended	By	Update	d By	Status	Actio	ns	
Discharge	ARC Test Service		2021/03/10 01:00:26 PM		,		L., Ben		active	End S	ervice	
Ceave with Permission	Covenant House Health Care	e Services	2021/03/10 12:59:02 PM	2021/03/10 01:00:02	PM L., Ben		L., Ben		inactive	View	Update	E
Complaint	Assessment and Referral Cer	ntre	2020/03/16 02:32:42 PM	2020/03/16 02:35:24	PM L., Ben		L., Ben		inactive	View		
Consent Case Management Attachment	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.





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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:

			Shelt User:	er:	L., Ben
Navigator				Client Management	- End of Service Edit
Clegg, Trinidad(16308) Summary History	Client No. Name	16308 Clegg, Trinidad		DOB	1970/11/09
Intake End of Service Encounter	Close J Save				
Admission Referral Discharge Leave with Permission Service Restriction Complaint Consent Case Management Attachment Tasks	End of Service Dispos	ition* (0/4000 characters)]	$\hat{}$

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

toronto SMIS				Shelter: User:		L., Ben
Navigator					Client Management	- End of Service Edit
Clegg, Trinidad(16308) Summary	Client No. Name	16308 Clegg, Trinidad			DOB	1970/11/0
Intake	Z Close	557				
End of Service Encounter Admission	(i) Saved Successfully!					
Discharge	End of Service Disposition	*	Permanent Housing	\sim		
Leave with Permission	End of Service Reason*		Private market housing	\sim		
Service Restriction Complaint Consent Case Management Attachment Tasks Print Label	End of Service Notes (0/40	000 characters)				





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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.

			Shelter: User:	L., B	en	Home	My Tasks Program	Reports	Administration acility She	Help	Logout Head Office
Navigator				Client Management - End	of Service						
Clegg, Trinidad(16308)	Client No.	16308									
History	Name	Clegg, Trinidad		DOB	1970/11/09		Age		50		
Intake	Back to Client Search Kepper	rt to Excel									
End of Service											
Encounter Admission	End of Service										
Referral	Program Name		Intake Date	Service End Date	Service Ended By		Updated B	у	Status	Acti	ons
Discharge	ARC Test Service		2021/03/10 01:00:26 PM	2021/03/10 01:03:40	M L., Ben	1	, Ben		inactive	View	Update
Service Restriction	Covenant House Health C	Care Services	2021/03/10 12:59:02 PM	2021/03/10 01:00:02	M L., Ben	1	House, Cov	enant	inactive	View	Update
Complaint	Assessment and Referral	Centre	2020/03/16 02:32:42 PM	2020/03/16 02:35:24	M L., Ben	1	, Ben		inactive	View	
Consent Case Management	3 items found, displaying all iter	ms.									

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

				5	Shelter: User:	House, Covenant			Home	My Tasks	Reports	Help	Logout
Navigator						Client Management - H	listory				n.		
Clegg, Trinidad(16308)	Client No.	16308											
History	Name	Clegg, Tr	rinidad			DOB	1970/11/	09		Age	50)	
Intake	🚱 Back to Client Search 🔎 Search 🔀 I	Export to Excel											(i) Help
End of Service Admission	Action Date		Start				End		1	-			
Referral	Action			~									
Discharge	Program			~									
Service Restriction Complaint	Client History												
Consent												Record	l per page 🛛 🗸
Case Management	3 records found, displaying all records.												_
Tasks	Action Date Action	Referen	ice					Program			Stan	Update	Date
Print Label	2021/03/10 End Service Updat	e End of S	ervice Disposition:	Shelter Referral.	End of Service R	eason: Voluntary tran	ster.	Covenant I	House Health Ca	are Services	s House, Covena	nt 2021/03	/10 01:08:48 PM
	2011/03/10 End Service	End of S	ervice Disposition:	Permanent Housir	ng. End of Servi	ce Reason: Long-term	care facility.	Covenant I	House Health Ca	are Services	s L., Ben	2021/03	/10.01.00.02.PM
	2021/03/10 Intake							Coronant	nouse ricular ca	are services	L., Ben	2021/03	/10 12:59:04 PM
	3 records found, displaying all records.												





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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.

			Shelter: User:		L., I	Ben		Hon	e My Tasks Repo	rts Administ	Shelter	Logout Head Office
Navigator				Statistic	s - ARC Test	Service						
ARC Test Service(12551)	Back to Programs Export to Excel											(i) Help
General												
Queue Service Oueue	End of Service Dispositions											
Queue History Clients		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
Incidents	Health or Correctional Facility	0	1	1	1	0	0	1	0	0	1	0
Service Restrictions	Other Hostel	1	3	3	3	0	1	4	0	1	4	0
Complaints	Permanent Housing	0	2	2	2	0	0	2	0	0	2	0
Staff	Temporary Housing	0	2	2	2	0	0	2	0	0	2	0
Statistics	End of Service Reasons											
Occupancy - Unique Clients		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
Client Services	Private market housing	0	0	0	1	0	0	1	0	0	1	0
Client Services -	Supportive housing	0	0	0	1	0	0	1	0	0	1	0
Discharge	Couch surfing	0	0	0	1	0	0	1	0	0	1	0
Discharge - Unique	Other temporary accommodation	0	0	0	1	0	0	1	0	0	1	0
Cliente	Police custody or incarcerated	0	0	0	1	0	0	1	0	0	1	0
End of Service End of Service - Unique Clients												

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.





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4. Added "Last 7 Days" and "Last 14 Days" Columns to the 'Discharge' and 'Endof-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.

toronto SMIS			Sheiter: User:		L., E	3en		Hor	ne My Tasks nt Program	Reports Admin	istration Help	Logout Head Office
Navigator			St	atistics - Birkdale	Residence -	Bedded Program						
Birkdale Residence -	Back to Programs Export to Excel											(i) Help
General Queue	Discharge Dispositions											
Service Queue Queue History		Yesterday	Last 7 Days	Last 14 Days	Corr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr	Last Yr Prev Qt	Curr Yr	Prev Yr
Clients	Automatic discharge	0	0	0	0	2	1	1	3	1	1	3
Incidents	Deceased	0	0	0	0	1	0	0	3	0	0	3
Service Restrictions	Health or Correctional Facility	0	1	1	1	0	0	1	4	0	1	4
Complaints	Permanent Housing	1	4	4	4	4	0	4	5	0	4	5
Dashboard	Shelter Referral	0	1	1	1	1	0	1	3	0	1	3
Statistics	Temporary Housing	0	1	1	1	2	0	1	3	0	1	3
Occupancy	Unknown Location	0	6	11	6	34	8	14	35	8	14	35
Occupancy - Unique Clients	Discharge Reasons											
Client Services Client Services -		Yesterday	Last 7 Days	Last 14 Days	Curr Mth	Same Mth Last Yr	Prev Mth	Curr Qtr	Same Qtr Yr	Last Prev Qt	Curr Yr	Prev Yr





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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

toronto SMIS			Shelter:	I Per		Home M	4y Tasks Rep	orts Administration	Help	Logout
			opu.	L, bei		Client	Program	Facility She	ter H	ead Office
Navigator				Client Management - Disc	charge					
Early, Norine(13735)	Client No.	13735								
History	Name	Early, Norine		DOB	1986/09/04		Age	34		
Intake	Back to Client Search Keport to	Excel								(i) Help
End of Service										
Admission	Discharge									
Referral	Program Name		Admission Date	Discharge Date	Discharged By	U	pdated By	Status	Action	s
Discharge	Birkdale Residence - Beddeo	l Program	2021/03/09 09:27:24 AM	2021/03/09 09:31:00 AM	4 birkdale, supervisor	bir	rkdale, cw	discharged	View	Update
Leave with Permission	Evals Diaco		2010/09/03 12-40-39 DM	2010/08/03 12-40-35 DM	a			dischargod	Minut	





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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:

toronto SMIS			Shelter: User:	L., Ben	Home	My Tasks Program	Reports	Administratic
Navigator			Client Ma	anagement - Add/Edit Intake				
, ()	🔀 Close 🕞 Save 🏹	Print blank form						
	Intake Program	n						
	Program*	Central Intake		✓ Type : Service				
	O Never Expires	s	Stat	tus Creation in progress		Prev. Statu	5 N//	۹.
	Expires Now End Date							

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





7. Made the [Pronoun Field] Mandatory

The "Pronoun" field in the [Personal Info] section is now a mandatory field.

Personal Info					
First Name*	Shona	Last Name*	Applewhite	DOB*	2009/01/01
Gender*	Female 🗸	Pronoun*	she/her	Alias	SA

8. Added "Bahamas" as an option in the [Living Situation > Country of Origin] field

A new option "*Bahamas*" has been added to the current drop-down list of "*Country of Origin*" field in the Living Situation section.

Below is a sample screenshot of the Intake screen:

Image: https://was-intra-qa/ of #154339; SM/5: Add an option Ele Edit View Favorites Jook Image: model with the second se	toronto.ca/SMIS/PMmodule/Qr Shelter Management Infor Help Safety * Tgols * @* \$	ustrointakeEdit.do?method × 1 Shelter Managerr	= update&intakeld=0&iprogramid= nent Informati 👔 Shelter Manag	11851 gement infor	mati [-> ∰ Ĉ Seard	h	2				- 5 0- @ ☆ (×
					Shelter: User:	Hollands,	Linda		Home	My Tasks Program	Reports Fax	Administration	Help	Logout Head Office	^
Navigator					C	Client Managem	ent - Add/Edit Intake								
Aicklen, Travis(206296)	🔀 Close 🔒 Save													(j) H	telp
Summary	Intake Program														
Intake	Program*	Central Intake				~	Type : Service								1
Encounter Admission Referral Discharge	 Never Expires Expires Now End Date 		Status Cr	reation in p	progress										
Leave with Permission		🇰 11:59 PM													
Complaint	Personal Info														í T
Consent Case Management	First Name*	Travis			Last Name*	Aicklen			DOB*	1989/11	/16				11
Attachment Tasks	Gender*	Female		~	Pronoun				Alias						
Print Label	Phone	300X-300X-300X			Email										
Eligibility Assessment Transactions - New Summary/Detail	Comments/ Details (0/4000 characters)		CANADA			^									
[+] Advanced	Living Situation		AFGHANISTAN AUSTRIA												í I
	• We want to bet	ter understand wh	ALBANIA ALGERIA ANGOLA												11
	Length	of homelessness	BAHAMAS				🛿 How long have you been	experiencing	g homelessr	ess?					
	Sleepin	g arrangements*	BARBADOSH				Where did you sleep last	night?							
	Rei	ason for service*	BELGIUM				Why do you need to acce	ess shelter se	rvices?						
	Have you lived o the	nly in Toronto in act 12 months?*	BERMUDA BOLIVIA				Have you lived only in To	pronto for the	last 12 mo	nths?					

9. New Field: Identify a client's service start date

A new section called "Length of Homelessness" has been added. This section only has one Calendar selection field titled *"When did this client begin accessing your*





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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.





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	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 🗸





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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:

Contact Information		
Client's Contacts Can include client's other support workers, n	next of kin, emergency contacts, etc.	
Primary Worker	A., Test	
Select Contact Type (office,	Ab, Estelle	
	Ab, Teri	
	Aretusi, Claudio	
	B, Eliza	
Add Contact Remove Contact	Boucher, Brad	
	C, Betsy	
	C, Chelsea	
OW/ODSP Status from SAMS databas	C., Martha	
Benefit Unit Status	Case Worker, Multi User	A 1
bellent onit Status	D, Clyde	U ₂

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

16

toronto S	MIS					Clients Within Past 6	0 Days (Bed)				Print
											Printed: 2021/02/19 02:02:
Reporting Period: 2023/0	2/19										
Names			Birkdale Residence - Bedded Progr	am			Facilitys	Birkdale Residence	e		
Ascription:			mothers-16, female children, male	s elementary school age			Phonei	416-392-5650			
Health Information Custor	dian:		No				Type:	Bed			
katusi			Active				Space Capacity:	50			
Funding Capacitys			50				straining a second state	Ras			
Minimum Age:			0				Maximum Age:	100			
Type of Report:		Clients within the	e past 60 days 🗸			Primary Work	HT:	B., IntakeWorker	×)		Search
											Excel
Client No.	Last Name		First Name	Admission Date	Room	Bed	PNA Eligibility	Discharge Date	Most Recent Case Note	Incomplete Case Notes	Primary Worker
12914	Dooley		Treva	2021/02/04 03:03:21 PM	403 C1, C2						8., IntakeWorker; Boucher, Brad
2731	202		180	2020/10/27 02:39:05 PM				2021/02/18 03:26:30 PH			8., IntakeWorker
2732	300		kiddidik	2020/10/27 02:39:05 PM				2021/02/18 03:26:30 PM			8., IntakeWorker
22833	Dooley		60	2021/02/04 03:03:21 PM				2021/02/19 10:42:40 AM			B., IntakeWorker: Case Worker, Multi User





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Facility Management > Client Report

ent Report - Internet Explorer														-
						Facility	Active Clients							Print
													Pr	nted: 2021/02/19 02:01
eporting Period: 2021/02/19														
ames		Birkda	le Residence					Shelters		Ber	idale Residence			
escription:		mothe	ers and children					Contact:		An	ie Doppelt			
ctori		Famili	es					Phones	-	(4	6) 392-5719		_	
atusi		Active						Health Infi	ormation - waarn	No				
ype of Report:	Active Clients		~						Pri	nary Worker:	Boucher, Brad	~	\rightarrow	Search
rogram:	Any			~										
														14 Excel
rogram	Client No.	Last Name	First Name	Never Expired	Intake Status	Last Intake/ Admission Date	Room	Bed	PNA Eligibility	End/ Discharge Date	Most Recent Case Note	Incomplete Case Note	Primary Worl	er .
irkdale Residence - Bedded Program	12914	Dooley	Treva		admitted	2021/02/04 03:03:21 PM	403 C1, C2						B., IntakaWor	ver; Boucher, Brad
irkdale Residence - Bedded Program	22834	er .	55		admitted	2021/02/05 09:12:15 AM	MojoBed						Boucher, Brad	
items found, displaying all items.														

Shelter Management > Client Report

toronto SMIS						Shelter	Active Clients								Print: Close
														Printed:	2021/02/19 02:03:17 Pt
eporting Period: 2021/02/19															
reten		Birkdale	Residence					Organizatio	ei		City of Toronto				
cription:		mother	and children: refuge	e claimants				Contects			Arnie Doppelt				
10								Phone:							
tus:		Active													
pe of Report:	Active Clients		~								Primary Worker:		Any		Search
ogram:	Any				~								1111, t'ttt B., IntakeWorker		
													Boucher, Brad H., Mike		📧 Excer 🔧 PD
ogram	Client No.	Last Name	First Name	Never Expired	Intake Status	Last Intake/ Admission Date	Room	Bed	PNA Eligibility	End/Disch	inge Date	Case Note	Incomplete Case	Primary Worker	
dale Residence - Bedded Program	12914	Dooley	Treva		admitted	2021/02/04 03:03:21 PM	403 C1, C2							8., IntakeWorker; Bo	ucher, Brad
dale Residence - Outreach Program	16759	Haro	Tracy	Yes	active	2021/01/29 03:48:55 PM									
dale Residence - Bedded Program	20622	11	er		admitted	2021/02/05 09:11:31 AM	MojoBed							1111, t'ttt; H., Mike	
dale Residence - Outreach Program	21571	Haro	Troy	Yes	active	2021/01/29 03:49:07 PM									
dale Residence - Bedded Program	22834	11	55		admitted	2021/02/05 09:12:15 AM	MojoBed							Boucher, Brad	





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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).

Assets	CPP	CPPD
Child Support	Child Tax Benefit	Employment
Employment Insurance	GIS	None Declared
□ ODSP	□ OSAP	Old Age Security
Ontario Works (OW)	D PNA	Savings
U WSIB	Other, please specify	
Estimated monthly income		
What was the last taxation year that you file	d for?	





Version 3.5 April 2021

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:

Client Details		
• Now I'm going to ask you a few questions about your background. and other factors, and so we can figure out how we can serve you bet	e ask everyone these questions to understand how peoples' experience with our services may be impacted by gender, Indi r. You can choose whether or not to answer these questions. Regardless of what you choose, you will still have access to c	igenous identity, race, our services.
In Canada, the term "Indigenous" includes First Nations, Métis, or Inuit. Do y	u identify with any of these three groups?*	
~		
Which race category best describes you?*		
~	Please describe	
Have you ever conved in the Canadian Militany or DCMD28		





Version 3.5 April 2021

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*".





Version 3.5 April 2021

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 <u>before</u> the changes:

Do you have any existing housing applications? (If availabl	e, please enter the client's application number)		
Housing Connections	⊖ Yes ⊖ No ⊖ Unknown	Application number	
Access Point	⊖ Yes ⊖ No ⊖ Unknown	Application number	
Centralized Access to Residential Service (CARS)	⊖ Yes ⊖ No ⊖ Unknown	Application number	
Other housing application(s) or notes (0/4000 characters)		
1			
Context Information			

Below is a sample screenshot <u>after</u> the changes:





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





Version 3.5 April 2021

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 y Please see the supports assessment guide on how to ask the	ou feel comfortable, please share your support needs in any of the follow se questions.	ing areas:
Health & Wellness	Accessibility	Oth
✓ Allergies or dietary restrictions	Limited mobility	L t

When user clicks on this link, a pop-up window will be displayed and file is in a pdf format

okup/LookupCodeList.do?metho	d=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
	Table of Contents
	Supports Assessment Guide (Pilot)
	Overview
	Pilot project
	Questions and feedback
	Purpose
	SMIS/STARSS-A Unified Intake
	1. Client Details
	Key points for clients
	Key points for staff
	Preamble
	1a. Indigenous identity
	1b. Racial Identity Question
	1c. Veteran question
	1d. Refugee question
	2. Support Needs





Version 3.5 April 2021

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:



Below is a sample screenshot after the changes:





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Triage: Recommended Level of Supports To be completed by staff.

- Clow
 Clinet has few support needs and does not require much assistance to find or maintain housing.
 Clinet has leedf-manage any mental health, physical health, or substance use issues.
 The clinet has likely been homeless for less than 6 months.
 The clinet is 25 years do to older.
- 🔿 Medium
- He client needs some assistance from staff to find housing and connect with supports.
 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 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/" and/" 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 houseless for longer than 1 year.





Version 3.5 April 2021

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 see the supports assessment guide on how to ask these questions.	, please share your support needs in any of the following areas:	
Health & Wellness	Accessibility	Other Supports
Allergies or dietary restrictions	Limited mobility	Pet owner
Harm reduction/substance use support	Wheelchair accessibility	Legal or immigration
Medication support	Vision/hearing/speech	Religious/cultural supports
Pregnancy support	English translator	Cofet, comme (at risk of violence, self-harm)
Mental health support	Reading/completing paperwork	VAW supports
Physical health support	Other accessibility supports	Supports for survivors of human trafficking
Support for daily activities		Other urgent support needs
Other health support		
Supports comments/details (0/4000 characters)		





Version 3.5 April 2021

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.

👰 CI	ient Search Criteria L., Ben
First Na	No Anonymous Client?
Enter	First Name
Last Na	me:
Enter	Last Name
	Search Reset





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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.

Client Search Criteria L, Ben
Yes Anonymous Client? Alias:
Alias Name Input
Anonymous Description:
Anonymous Description Input
Search Reset

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.

	Client Search Criteria L., Ben
$\left(\right)$	Please enter 1 or more characters into either the 'Alias' and/or the 'Anonymous Description' field when conducting a search. At least one of these two fields must be entered. Yes Asonymous Client? Alias:
	Alias Name Input

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





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Clier	nt Search Criteria L., Ben	\equiv
Yes	Anonymous Client?	
Alias:		
Alias Nar	ne Input	
Anonymou	s 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: 23	
Alias: Hello001	
Gender: F	
DOB: 2021-02-09	
Anonymous Description: purple milk	
Alias: QING	
Gender:	
DOB:	
Anonymous: Y	



New Client

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button and the 'New

To create a new anonymous client, user clicks on the *Client'* screen will be displayed.

New Client L., Ben
No Anonymous Client?
First Name(*):
First Name Input
Last Name(*):
Last Name Input
Gender(*)
Date of birth(*)
Date of birth
Cancel





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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.

Yes	Anonymous Client?	
Alias:		
Alias Name	e Input	
Anonymous	Description(*)	
Anonymou	s Description Input	
Gender		
		•
Date of birth		

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





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5	ncounter L., Ben	
Enc	ounter	
	No Requires EMS?	
Locatio	n:	
Input	Location Notes	
Current	Sleeping Arrangement:	
		Ŧ
Do you	want assistance to secure	
		housing?
		• housing?
Aborigi	ial:	• housing?
Aborigi	nal:	• housing? •
Aborigii Marital	nal: Status:	• housing? •
Aborigii Marital	nal: Status:	• housing? •
Aborigi Marital	nal: Status: ge:	• housing? •
Aborigi Marital	nal: Status: ge:	* housing? * *
Aborigi Marital Langua Dogs:	nal: Status: ge:	* housing? * *





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

	Return	
Client N	lo: 22992	
Active: I	No	
Alias: Fl	R	
Gender:	: F	
DOB: 19	978/01/01	
Anonym	ious: Y	
Anonym	ious Description: red brown bag	
amily		
Curren	t Program	
listory		
listory Incoui	nter 🖸	
	nter 🖪 ter Date: 2021/02/18 04:44 PM (Reviews:	
Listory Encour 1) Last Up	nter 🖸 ter Date: 2021/02/18 04:44 PM (Reviews: date Date: 2021/02/18 04:44 PM	
Encour Incour Encour 1) Last Up Status:	nter 🖸 ter Date: 2021/02/18 04:44 PM (Reviews: date Date: 2021/02/18 04:44 PM S2H Transporting	
Encouri Encouri 1) Last Up Status: Encouri	ter Date: 2021/02/18 04:44 PM (Reviews: date Date: 2021/02/18 04:44 PM S2H Transporting ter Type: Initial Assessment	
Encount Encount 1) Last Up Status: S Encount Notes: c	ter Date: 2021/02/18 04:44 PM (Reviews: date Date: 2021/02/18 04:44 PM S2H Transporting ter Type: Initial Assessment	
Encount 1) Last Up Status: 2 Encount Notes: 0 Location	ter Date: 2021/02/18 04:44 PM (Reviews: date Date: 2021/02/18 04:44 PM S2H Transporting ter Type: Initial Assessment ig n Notes: dgdf	
Encount 1) Last Up Status: 1 Encount Notes: 0 Location Encount 2)	ter Date: 2021/02/18 04:44 PM (Reviews: date Date: 2021/02/18 04:44 PM S2H Transporting ter Type: Initial Assessment dg n Notes: dgdf ter Date: 2021/02/18 04:43 PM (Reviews:	
Encount Encount 1) Last Up Status: 2 Encount Notes: 0 Location Encount 2) Last Up	ter Date: 2021/02/18 04:44 PM (Reviews: date Date: 2021/02/18 04:44 PM S2H Transporting ter Type: Initial Assessment ig n Notes: dgdf ter Date: 2021/02/18 04:43 PM (Reviews: date Date: 2021/02/18 04:43 PM	
Encount Encount 1) Last Up Status: 2 Encount Notes: 0 Location Encount 2) Last Up Status: 1	ter Date: 2021/02/18 04:44 PM (Reviews: date Date: 2021/02/18 04:44 PM S2H Transporting ter Type: Initial Assessment ig n Notes: dgdf ter Date: 2021/02/18 04:43 PM (Reviews: date Date: 2021/02/18 04:43 PM Closed	
Encount 1) Last Up Status: 1 Encount Notes: 0 Location Encount 2) Last Up Status: 1 Encount	ter Date: 2021/02/18 04:44 PM (Reviews: date Date: 2021/02/18 04:44 PM S2H Transporting ter Type: Initial Assessment dg n Notes: dgdf ter Date: 2021/02/18 04:43 PM (Reviews: date Date: 2021/02/18 04:43 PM Closed ter Type: EMS Assessment	





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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.





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Encounter Edit L., Ben
Return
Anonymous
Alias:
FR
Anony Desc(*):
red brown bag
Gender:
Date of birth:
1978-01-01
Cancel Submit





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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:
FRgfdgfgfg
Anony Desc(*):
red brown bag bags
Gender:
Date of birth:
1978-01-01
Cancel Submit





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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.

	Status: Awaiting EMS Encounter Type: Initial Assessment EMS Note: gsdfg
	Location Notes: gsold
$\left(\right)$	Alias: gg Anonymous: Yes Anonymous Description: purple sleeping bag Encounter Date: 2021/02/08 05:25 PM (Reviews:
	Last Update Date: 2021/02/09 09:29 PM Status: Follow-Up
	Encounter Type: EMS Assessment
	Follow Up Notes: fasdf
	Location Notes: fasdf
	Alias: OING
	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
	Name: gggggggg gggggggg
	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
	Name: gggg gggg
	Anonymous: No
	Encounter Date: 2021/02/09 07:02 AM (Reviews:
	2)

