



SMIS Release Notes

Version 3.7
March 2022

The Shelter Management Information System (SMIS) is a web-based information management system used by many programs across the City that provide services to individuals and families experiencing homelessness. SMIS is administered by the City's Shelter, Support and Housing Administration (SSHA) division. SMIS is primarily used by City-funded shelters, 24-hour respites, and COVID-19 temporary shelter programs to conduct client intake, admission, case management, and discharge. It is also used by some service programs (e.g., eviction prevention, drop-in programs).

This set of Release Notes describes the **9 enhancements** that are included in the March 2022 SMIS enhancement, release version 3.7. All changes included in this SMIS enhancement were prioritized by the City of Toronto SMIS Steering Committee and Director Group. Combined, these changes address the highest current priority change requests in SMIS.

There are a total of 9 enhancement areas in this release, of which most will be apparent to all end users. All changes are detailed in the following pages.

Please note that this document will also be available online at [Shelter Management Information System \(SMIS\) – City of Toronto](#).



SMIS Release Notes

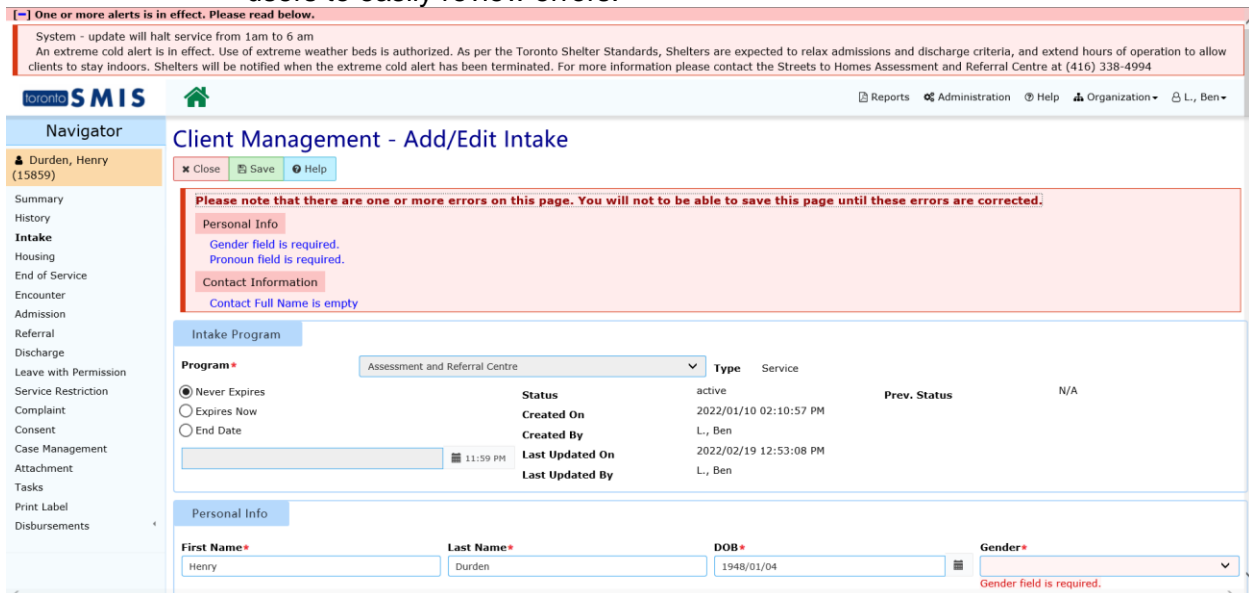
Version 3.7
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Table of Contents

1. [Introduced Significant Accessibility Enhancements to the SMIS Intake Module](#)
2. [Introduced Real-Time Validation to the \[Contacts\] Section in the SMIS Intake Module](#)
3. [Migrated 3 Fields from the SMIS Intake Module to the New Housing Module](#)
4. [Introduced a Number of Changes to the SMIS Intake Module](#)
5. [Introduced a Number of Changes to the "Client Report for Case Managers"](#)
6. [Introduced Major Enhancements to the Attachment Module](#)
7. [Introduced a New Housing Module](#)
8. [Introduced History Logs to the attachments module and housing module](#)
9. [Improved the User Interface & Added Real-Time Validation to the \[Family\] Section in the SMIS Intake Module](#)


1. Introduced Significant Accessibility Enhancements to the SMIS Intake Module

- a. This Release includes a significant number of accessibility enhancements to the SMIS user interface, in compliance with the (1) Accessibility for Ontarians with Disabilities Act standards and (2) City of Toronto Standards for corporate accessibility. Changes include:
 - i. Added supports for assistive technologies (e.g., screen readers) to allow users to more effectively use assistive technologies to navigate SMIS and input client information. This includes keyboard navigation, via keyboard hotkeys, and screen reader compatibility.
 - ii. Improved colour-contrasts (e.g., fonts, section headers, alerts, the navigator-pane) to ensure that there is an appropriate colour-contrast for information that is displayed in SMIS, so that users with visual support needs can see the information displayed on screen.
 - iii. Added screen-scalability to the (1) Intake, (2) housing, and (3) attachments modules, so that the screen will automatically adjust its scaling, depending on the current size of the user's screen.
 - iv. Made errors easier to identify, navigate to, and correct to ensure that error messages are displayed closer to the source of the error to support users with short-term memory support needs. Also provides new navigation to allow users to easily review errors.



[-] One or more alerts is in effect. Please read below.

System - update will halt service from 1am to 6 am
An extreme cold alert is in effect. Use of extreme weather beds is authorized. As per the Toronto Shelter Standards, Shelters are expected to relax admissions and discharge criteria, and extend hours of operation to allow clients to stay indoors. Shelters will be notified when the extreme cold alert has been terminated. For more information please contact the Streets to Homes Assessment and Referral Centre at (416) 338-4994

toronto **SMIS**  Reports Administration Help Organization L., Ben

Navigator **Client Management - Add/Edit Intake** Close Save Help

Please note that there are one or more errors on this page. You will not be able to save this page until these errors are corrected.

Personal Info
Gender field is required.
Pronoun field is required.

Contact Information
Contact Full Name is empty

Intake Program

Program *	Type	Service	Status	Prev. Status	N/A
Assessment and Referral Centre	active		Created On	2022/01/10 02:10:57 PM	
			Created By	L., Ben	
			Last Updated On	2022/02/19 12:53:08 PM	
			Last Updated By	L., Ben	


Personal Info

First Name* Henry Last Name* Durden DOB* 1948/01/04 Gender*
Gender field is required.

- v. Replaced the Alert Message screen so that it is screen reader compatible and easier for the user to review. Additionally added the option to minimize the alerts on the current page.

[-] One or more alerts is in effect. Please read below.

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An extreme cold alert is in effect. Use of extreme weather beds is authorized. As per the Toronto Shelter Standards, Shelters are expected to relax admissions and discharge criteria, and extend hours of operation to allow clients to stay indoors. Shelters will be notified when the extreme cold alert has been terminated. For more information please contact the Streets to Homes Assessment and Referral Centre at (416) 338-4994

toronto **SMIS**  Reports Administration Help Organization L., Ben

Client Management - Add/Edit Intake

Intake Program

Program *	Assessment and Referral Centre	Type	Service	Prev. Status	N/A
<input checked="" type="radio"/> Never Expires		Status	active		
<input type="radio"/> Expires Now		Created On	2022/01/10 02:10:57 PM		
<input type="radio"/> End Date		Created By	L., Ben		
		Last Updated On	2022/02/19 12:53:08 PM		
		Last Updated By	L., Ben		

Personal Info

First Name *	Henry	Last Name *	Durden	DOB *	1948/01/04	Gender *	Male
Pronoun *	fdidsfids	Also Known As	dd	Phone	XXX-XXX-XXXX	Email	

Comments/ Details (5/4000 characters)

ghgh

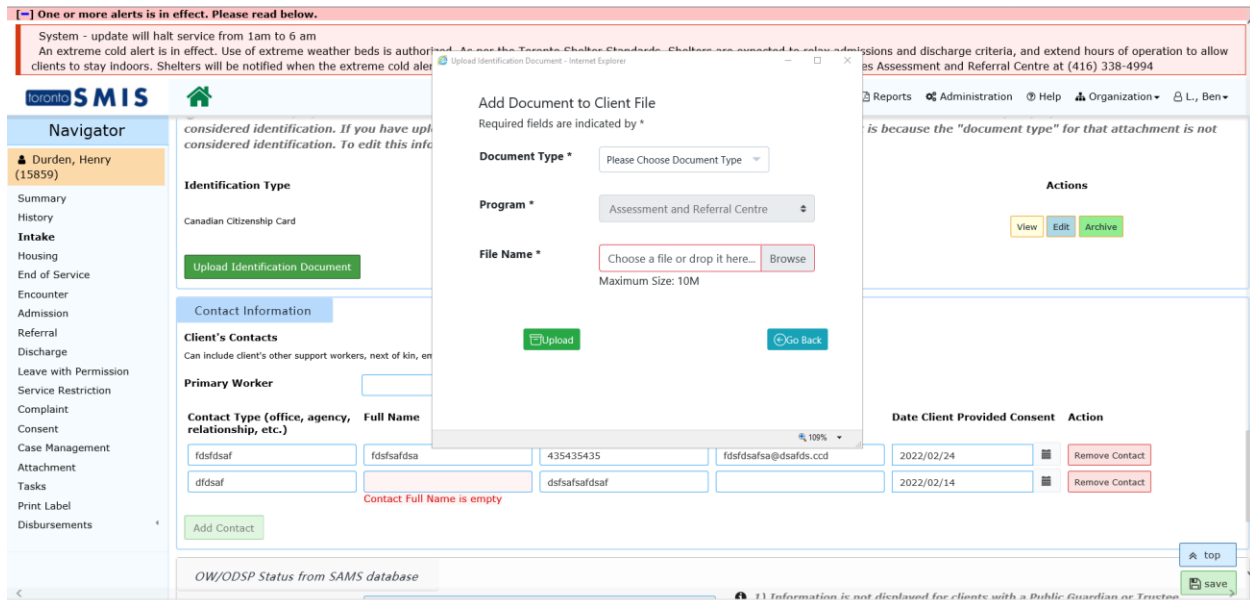
Living Situation

2. Introduced Real-Time Validation to the [Contacts] Section in the SMIS Intake Module

- a. Added real-time validation to the Contacts section, to ensure that Users complete all essential fields before saving the record. This includes the following changes:
 - i. The [Contacts] field is optional by default. Within this field:
 1. The [Contact Type] and [Contact Name] subfields become mandatory if any data is entered.
 2. The [Phone Number] and/or [Email] subfields can only be written once the [Contact Type] and [Contact Name] subfields are completed. These subfields are optional by default.
 3. The [Date that the Client Provided Consent to Contact] subfield is optional by default, but is mandatory if either the [Phone Number] and/or [Email] subfields are written.
 4. The [Add Contact] Button can only be clicked if all mandatory subfields from the previous client rows are completed.
 - ii. If no contact rows are completed, a warning message will display at the top of the screen, to remind the user to collect this information at the earliest opportunity.

-
3. **Migrated 3 fields from the SMIS Intake Module to the New Housing Module**
 - a. Three fields have been permanently migrated from the SMIS Intake Module to the New Housing Module. This includes:
 - i. The [Estimated Monthly Income] field
 - ii. The [Last Taxation Year a Client Has Filed a Return for] field
 - iii. The [Applications] field
 - b. Upon creating a housing record for a client, for a program, the User will have the option to copy over any pre-existing data that existed for these fields prior to the introduction of this Release. This option is presented as an [Copy] button.

 4. **Introduced a Number of Changes to the SMIS Intake Module**
 - a. The [Housing Essentials] section has now been separated into two distinct sections, reading [Income] and [Identification], to reflect the migration of the 3 fields described in change 3 above.
 - b. The previous [Identification] checkbox field has been completely replaced with a new [Identification on Record] section that allows the user to (1) upload, (2) view, (3) edit, and (4) archive client attachments that meet the definition of "Identification" (e.g., driver's license, health card, passport). Any Attachments uploaded by this function will be stored in the [Attachments] module, but accessible via the [Intake > Identification on Record] field as well, for the respective program.



- c. Removed the "Length of Homelessness" criteria from the [Level of Support] field, as user research indicated that the 'length of homelessness' criteria are not necessarily correlated with depth of need.
- d. Replaced the wording of the [Support Needs > Other Supports > "VAW Supports"] field option with "Intimate Partner Violence/Sexual Violence Supports".

5. Introduced a number of changes to the "Client Report for Case Managers"

- a. Modified the source data points for 10 fields in the "Client Report for Case Managers" to reflect the 3 fields, and their subfields, that have been permanently migrated from the SMIS Intake Module to the New Housing Module.
- b. Introduced Excel-exportability for the report.
- c. Added a new column to display the "Family Head's Client ID", to allow for the user to more easily sort and group families in this report.



SMIS Release Notes

Version 3.7

March 2022



Client Report for Case Managers

Print Close

Printed: 2022/03/03 08:48:08 PM

Reporting Period: 2022/03/03

Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	416-392-5650
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	150
Funding Capacity:	150	Male/Female:	Transgender, Non-binary or Two Spirit
Minimum Age:	0	Maximum Age:	100

Primary Worker: Client Age Range:

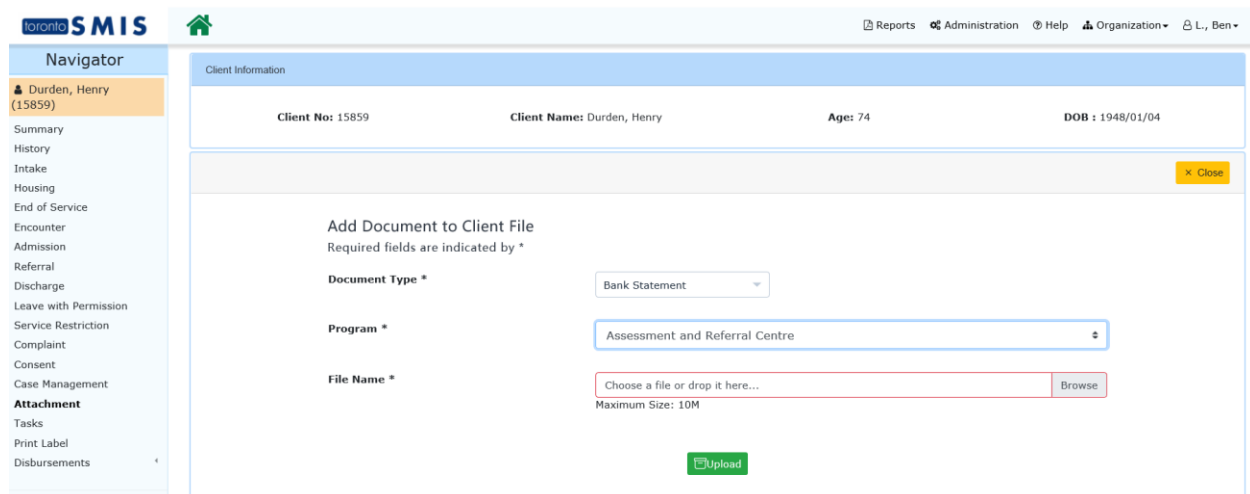
Excel

Client Information				Demographic Information				Program Info		Client Homelessness History			Housing Essentials				Housing Applications				Support Level						
Client No.	Last Name	First Name	DOB	Age	Gender	Pronoun	Indigenous Identity	Military Status	Refugee Status	Household Size	Family Head Client No.	Primary Worker	Chronically Homeless	No. of Bednights within Current Stay	Length of Homelessness in Bed's in the Past 5 Years	Income Source	Last Taxation Year Client Filed For	Status ID	Picture ID	Other ID	Access to Housing Application	Access to Housing No.	Access Point Application	Access Point No.	CARE No.	CARE Level	Support Level



6. Introduced Major Enhancements to the Attachment Module

- a. Improved the options for uploading attachments, including:
 - i. Removed the previous [Document Category] field (which listed 12 options) and replaced it with a mandatory [Document Type] field (which now lists 125 options). This allows the user to more specifically identify what type of attachment is being uploaded.
 - 1. All previously uploaded documents will automatically be converted to the new [Document Type] field, and will be automatically tagged with a Document Type of "Other-[Previous Document Category]". For example, an attachment that was uploaded before the Release with the document category of "Legal" will appear with the Document Type of "Other-Legal".
 - ii. Introduced "Smart Search" to the [Document Type] field so that the user can more easily navigate the large list of options. The User can either scroll down the list of options to select the document type, or they can type the first few letters in and then select the type from a shortened version of the list (e.g., typing "C A N" would bring up Canadian birth certificate, Canadian driver's licence, Canadian passport, etc.).
 - iii. Added a mandatory [Expiry] field, that only populates for applicable Document Types (e.g. for driver's license document type).
 - iv. Added a mandatory [Description] field that is only applicable if the user selects the "other" Document Type field option.
 - v. Adjusted the upload limit for an attachment to 10 MB (previously 2 MB).
 - vi. Limited the types of attachments that can be uploaded to xlsx, pdf, docx, png, and jpg.



The screenshot shows the SMIS web interface. On the left is a 'Navigator' menu with options like Summary, History, Intake, Housing, etc. The main content area is titled 'Client Information' and shows details for 'Client No: 15859', 'Client Name: Durden, Henry', 'Age: 74', and 'DOB: 1948/01/04'. Below this is a form titled 'Add Document to Client File' with the following fields:

- Document Type ***: A dropdown menu with 'Bank Statement' selected.
- Program ***: A dropdown menu with 'Assessment and Referral Centre' selected.
- File Name ***: A text input field with a 'Browse' button. Below the field, it says 'Choose a file or drop it here...' and 'Maximum Size: 10M'.


At the bottom of the form is a green 'Upload' button. A 'Close' button is visible in the top right corner of the form area.

- b. Improved the options for users to access attachments across multiple pages in SMIS.
 - i. All client attachments now "live" in the Attachments module, and are also accessible in different SMIS pages, where applicable and driven by the [Document Type] field. More specifically:
 1. Attachments module: Displays all attachments, regardless of the [Document Type] that is selected by the user
 2. Intake & Triage module: Only displays attachments where the user has selected a [Document Type] that is considered as a form of Identification (e.g. Photo ID, Health Card, passport)
 3. Housing Checklist module: Displays two groups of attachments:
 - a. Those where the user has selected a [Document Type] that is considered as a form of Identification (e.g. Photo ID, Health Card, passport).
 - b. Those where the user has selected a [Document Type] that is considered as a form of Housing Documentation (e.g. Arrears Repayment Plan, Bank Statement, Housing Applications, Notice of Assessment, Pay Stub, and T4).
- c. Improved the records list table for attachments, including:
 - i. Added a search bar to the records list table that searches across all displayed columns.
 - ii. Added display row controls to the records list table, allowing the user to select the number of rows that they prefer to have displayed on the current screen.

-
- iii. Added pagination controls to the records list table, allowing the user to navigate between pages more easily.
 - iv. Added a "total count" indicator, that displays the number of attachments that are currently available for the client (accounting for the program(s) that the user currently has access to).
 - v. Improved the records list table, so that it displays the following information for each attachment:
 - 1. File Name - the name of the uploaded file
 - 2. Document Type - the type of document that the user tagged the attachment as
 - 3. Program - the program that the attachment record is associated with
 - 4. Last Update by - the name of the user who last updated the respective attachment
 - 5. Last updated - the date that the respective attachment was last edited/uploaded.
 - 6. A [View] button - allows the user to view and export the respective attachment
 - 7. An [Edit] button - which allows the user to edit the respective attachment
 - 8. An [Archive/Restore] button - allows the user to inactivate attachments that are no longer useful for the client (archive feature), and likewise restore those same documents, if needed.
 - vi. Applied two-stage default sorting to the records list table:
 - 1. first by archiving: where active attachments are displayed at the top of the list, archived documents are displayed at the bottom of the list
 - 2. then by original upload date: where attachments will be displayed in order of the original upload date (irrespective of subsequent updates)
 - vii. Introduced manual sorting for all records list table columns, which override the second default sorting option listed above.

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toronto SMIS  Reports Administration Help Organization L., Ben

Navigator

- Durden, Henry (15859)**
- Summary
- History
- Intake
- Housing
- Encounter
- End of Service
- Admission
- Referral
- Discharge
- Leave with Permission
- Service Restriction
- Complaint
- Consent
- Case Management
- Attachment**
- Tasks
- Print Label
- Disbursements

Client Information

Client No: 15859
 Client Name: Durden, Henry
 Age: 74
 DOB: 1948/01/04

Documents in Client File Back to Client Search New Document View History log

Search Document List Show 12 Rows Total Count

Please Note: If an attachment has a "Last Updated" date that is March 15, 2022 or earlier, that attachment has not been converted to the new attachment format. This means that "Other" was automatically selected for the "Document Type" field using information from the old "Document Category" field. You can change this information at any time by (1) clicking "Edit" and then (2) selecting a "Document Type" that is more applicable for that attachment.

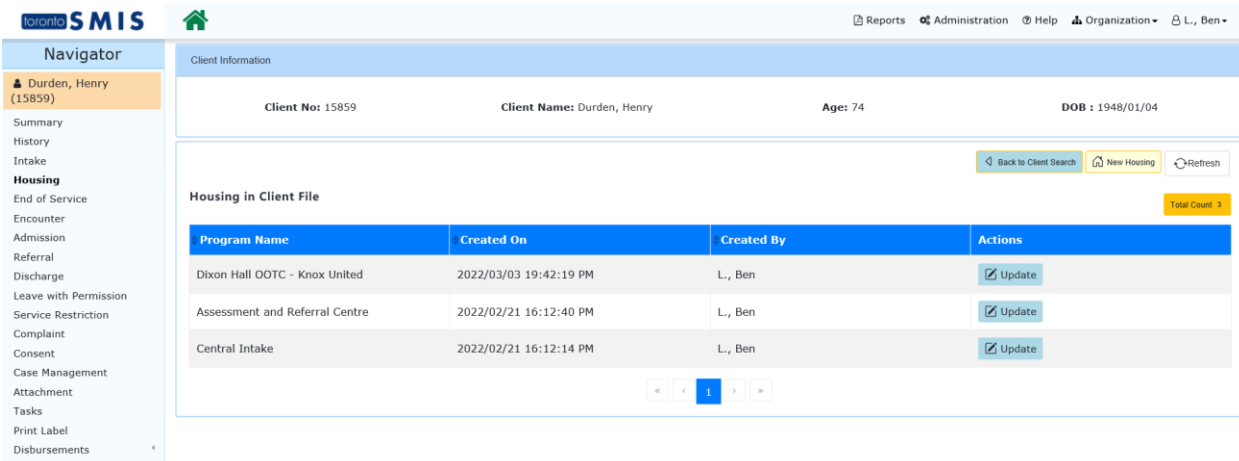
File Name	Document Type	Program	Last Update By	Last Updated	Actions
nyc medal (1) (1).jpg	Housing Application - Access Point	Central Intake	L., Ben	2022/03/03 19:30:35 PM	View Edit Archive
nyc medal (1) (1).jpg	Canadian Birth Certificate	Central Intake	L., Ben	2022/03/03 19:30:20 PM	View Edit Archive
nyc medal.jpg	Canadian Driver's Licence	Assessment and Referral Centre	L., Ben	2022/02/22 12:57:49 PM	View Edit Archive
nyc medal.jpg	Canadian Citizenship Card	Assessment and Referral Centre	L., Ben	2022/02/22 12:56:32 PM	View Edit Archive
nyc medal.jpg	British Columbia Health Card	Central Intake	L., Ben	2022/02/18 23:57:28 PM	View Edit Archive
nyc medal.jpg	Assessment	Central Intake	L., Ben	2022/02/18 23:57:47 PM	View Edit Archive

7. Introduced a New Housing Module

- a. This Release includes a new Housing module, that supports a user to collect and record essential information in supporting a client to procure housing (e.g. financial information, identification and housing documents, housing applications, Access to Housing program information).
- b. This Module is accessible through the SMIS Client Navigator Bar. Clicking this link takes the user to the records list table for the Housing Module. This records list table includes similar enhanced functionality to that in the Attachments module, such as pagination controls, total record counts, and manual column sorting functionality.

One or more alerts is in effect. Please read below.

System - update will halt service from 1am to 6 am
An extreme cold alert is in effect. Use of extreme weather beds is authorized. As per the Toronto Shelter Standards, Shelters are expected to relax admissions and discharge criteria, and extend hours of operation to allow clients to stay indoors. Shelters will be notified when the extreme cold alert has been terminated. For more information please contact the Streets to Homes Assessment and Referral Centre at (416) 338-4994



The screenshot shows the SMIS interface for Client Information. The client details are: Client No: 15859, Client Name: Durden, Henry, Age: 74, and DOB: 1948/01/04. Below this, the 'Housing in Client File' section contains a table with 3 records. Each record has an 'Update' button. The table has columns for Program Name, Created On, Created By, and Actions.

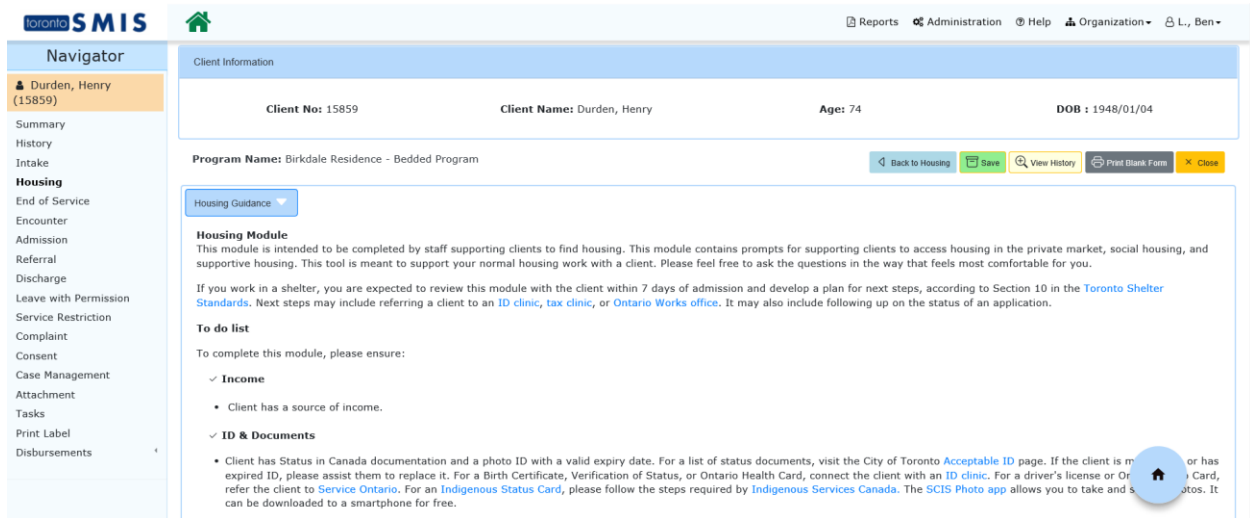
Program Name	Created On	Created By	Actions
Dixon Hall OOTC - Knox United	2022/03/03 19:42:19 PM	L., Ben	[Update]
Assessment and Referral Centre	2022/02/21 16:12:40 PM	L., Ben	[Update]
Central Intake	2022/02/21 16:12:14 PM	L., Ben	[Update]

- c. A User can create a housing record for a client only after a STARS intake has been created for the client, for the respective program (regardless of whether that intake is currently active/closed). In other words, both the intake record and housing records are linked to a client and a program.
- d. The Housing Checklist module is set to "never expire." This means that if a client returns to a program after discharge or end of service, users can access all data previously inputted to the housing record. Only one Housing Record can be created per program for each client and it can never be closed.
- e. The Housing Module includes significant help text and prompting to support a user in working with the client to procure housing. This help text is stored in the database, allowing for SMIS Administration staff to edit as needed separate from SMIS Releases.

- f. The Housing Module includes a total of 20 fields, including:
 - i. 6 display-only fields that pull from the corresponding intake for the client and program. These fields cannot be edited in the housing record, and can only be edited in the corresponding intake (provided that the intake is not closed). These fields include:
 - 1. Indigenous Identity
 - 2. military status
 - 3. refugee status
 - 4. triage level
 - 5. support needs checklist (Multi-select option, comma delineated)
 - 6. source of income (Multi-select option, comma delineated)
 - ii. 14 writable fields, including:
 - 1. Estimated Monthly Income
 - 2. Rent amount client feels they can afford
 - 3. Last taxation year a client has filed a return for
 - 4. Identification Documents on Record (Links to Attachments)
 - 5. Housing Documents on Record (Linked to Attachments)
 - 6. Housing Applications, which includes seven subfields:
 - a. Application Name
 - b. Has Client Applied
 - c. Eligibility Date (Mandatory if [Has the Client Applied] = Yes)
 - d. Date Application Last Updated (Mandatory if [Has the Client Applied] = Yes)
 - e. Application Number (Mandatory if [Has the Client Applied] = Yes)
 - f. Notes
 - g. Delete Application (only applicable to custom applications. Not applicable to the default three applications that are listed for all records, which include access point, access to housing, and centralized access to residential services)
 - 7. Does the client have access to the Applicant Portal?
 - 8. Client's Email Address that was used to register with Access to Housing Portal
 - 9. Notice of Assessment for current taxation year submitted to Access to Housing
 - 10. Date (of above submission)
 - 11. Client has arrears with social housing provider
 - 12. Who is the Arrears with
 - 13. Client has an active arrears repayment plan

-
- 14. Disadvantage (DA) priority designation requested in the application
 - g. Added Out-of-Date warning messages to 3 sections in the Housing Module (Financial Info, Housing Applications & Access to Housing Form), to inform a user if the information contained within the section is potentially out of date.
 - i. The warning will generate if any of the fields within the respective section have not been updated in three months (91+ days).
 - ii. The user can remove the warning by either (1) updating any of the fields in this section, or (2) clicking the [Confirm] button to confirm that the information is correct and does not need to be updated.
 - iii. If the user removes the prompt through either option, this restarts the 91+ day clock for the entire section.
 - 8. [Introduced History Logs to the attachments module and housing module](#)
 - a. Added a [History Log] to the (1) attachments module and (2) housing module, which allows the user to view a record of all changes made to any fields within the corresponding record, over the past 365 days. The function is accessed through the [History Log] Button at the top bar of the record. This button will direct the user to a separate History Log page, which lists the following fields for each historic change:
 - i. Field Name - the name of the field that was changed
 - ii. Old Value - the previous value that was entered (including blank for new entries)
 - iii. New Value - the new value that was entered
 - iv. Date of Change - the date and time that the change occurred
 - v. Changed by User - the name of the user that performed the change
 - vi. Changed by Program - the program of the user that performed the change
 - b. The History Log includes similar navigation options to the attachments record list table, including:
 - i. A search bar that searches across all displayed columns.
 - ii. Display row controls to allow the user to select the number of rows that they prefer to have displayed on the current screen.
 - iii. Pagination controls to allow the user to navigate between pages more easily
 - iv. A "total count" indicator, that displays the total number of changes that have been made to the record over the past 365 days.
 - c. The History Log is sorted in reverse chronological order by default (newest changes at the top), however there is a manual sorting function for all columns displayed in the records list table.

Below are sample screens of a Client's Housing record at a particular SMIS Service/Bed Program:



Client Information

Client No: 15859 Client Name: Durden, Henry Age: 74 DOB: 1948/01/04

Program Name: Birkdale Residence - Bedded Program

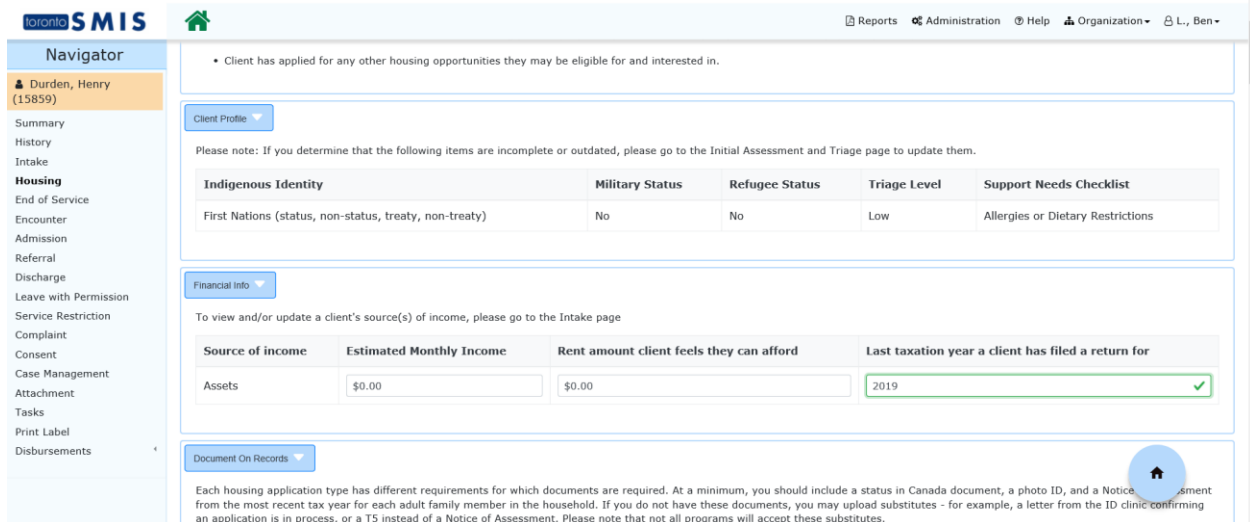
Housing Guidance

Housing Module
This module is intended to be completed by staff supporting clients to find housing. This module contains prompts for supporting clients to access housing in the private market, social housing, and supportive housing. This tool is meant to support your normal housing work with a client. Please feel free to ask the questions in the way that feels most comfortable for you.

If you work in a shelter, you are expected to review this module with the client within 7 days of admission and develop a plan for next steps, according to Section 10 in the [Toronto Shelter Standards](#). Next steps may include referring a client to an [ID clinic](#), [tax clinic](#), or [Ontario Works office](#). It may also include following up on the status of an application.

To do list
To complete this module, please ensure:

- ✓ **Income**
 - Client has a source of income.
- ✓ **ID & Documents**
 - Client has Status in Canada documentation and a photo ID with a valid expiry date. For a list of status documents, visit the City of Toronto [Acceptable ID](#) page. If the client is missing a valid ID, or has expired ID, please assist them to replace it. For a Birth Certificate, Verification of Status, or Ontario Health Card, connect the client with an [ID clinic](#). For a driver's license or Ontario Driver's License, refer the client to [Service Ontario](#). For an [Indigenous Status Card](#), please follow the steps required by [Indigenous Services Canada](#). The [SCIS Photo app](#) allows you to take and upload photos. It can be downloaded to a smartphone for free.



Client Profile

Please note: If you determine that the following items are incomplete or outdated, please go to the Initial Assessment and Triage page to update them.

Indigenous Identity	Military Status	Refugee Status	Triage Level	Support Needs Checklist
First Nations (status, non-status, treaty, non-treaty)	No	No	Low	Allergies or Dietary Restrictions

Financial Info

To view and/or update a client's source(s) of income, please go to the Intake page

Source of income	Estimated Monthly Income	Rent amount client feels they can afford	Last taxation year a client has filed a return for
Assets	\$0.00	\$0.00	2019 <input checked="" type="checkbox"/>

Document On Records

Each housing application type has different requirements for which documents are required. At a minimum, you should include a status in Canada document, a photo ID, and a Notice of Assessment from the most recent tax year for each adult family member in the household. If you do not have these documents, you may upload substitutes - for example, a letter from the ID clinic confirming an application is in process, or a T5 instead of a Notice of Assessment. Please note that not all programs will accept these substitutes.

9. Improved the User Interface & Added Real-Time Validation to the [Family] Section in the SMIS Intake Module

-
- a. Improved the user interface to the Family section, to allow the user to more easily search for existing clients to add as members of households and to create new clients as members.
 - b. Added real-time validation to the Family section, to ensure that Users complete all essential fields before saving the record. SMIS will check the section in the following ways:
 - i. All fields in the Family Section are checked to ensure that they are inputted in the correct format.
 - ii. All added family members are checked to verify that they do not have an existing service restriction for the respective program.
 - iii. All added family members are checked to verify that they are not duplicate entries for the same household. SMIS will generate an error message if so.
 - iv. All family members are checked to verify that they do not already have an active intake for the respective program.
 - c. Upon saving, all errors and warnings for all members, including the head of household, can be collectively viewed, at one place, within a new Validation Box, appearing at the top of the intake screen.