SMIS Release Notes

Version 3.7
March 2022

The Shelter Management Information System (SMIS) 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].

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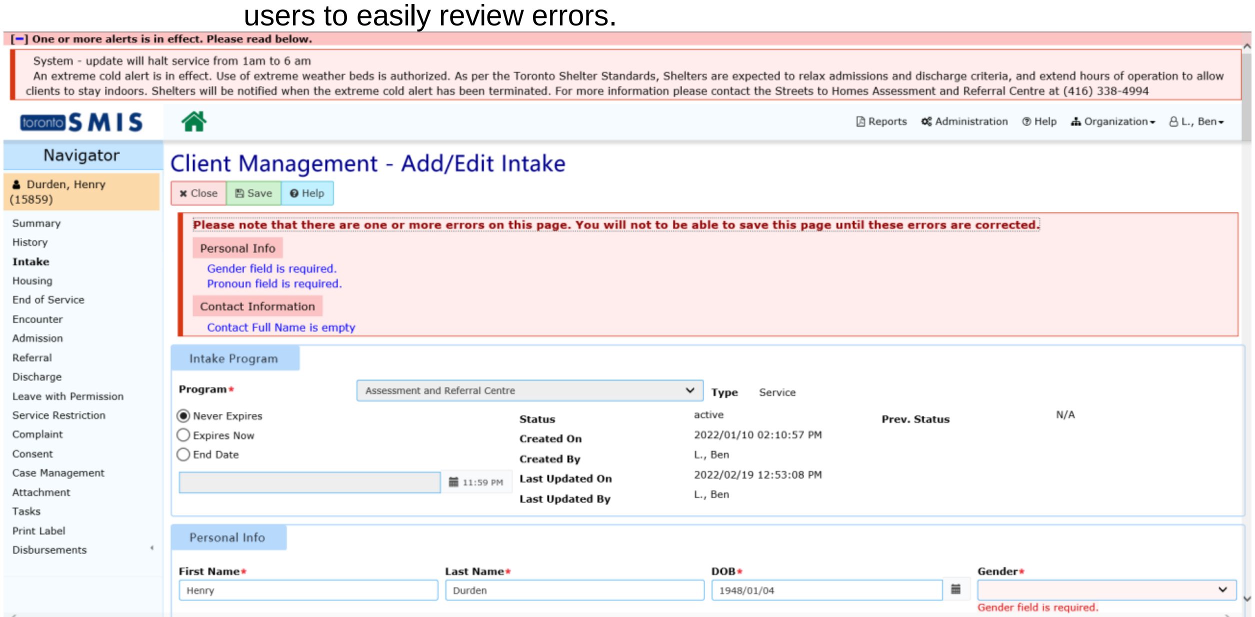
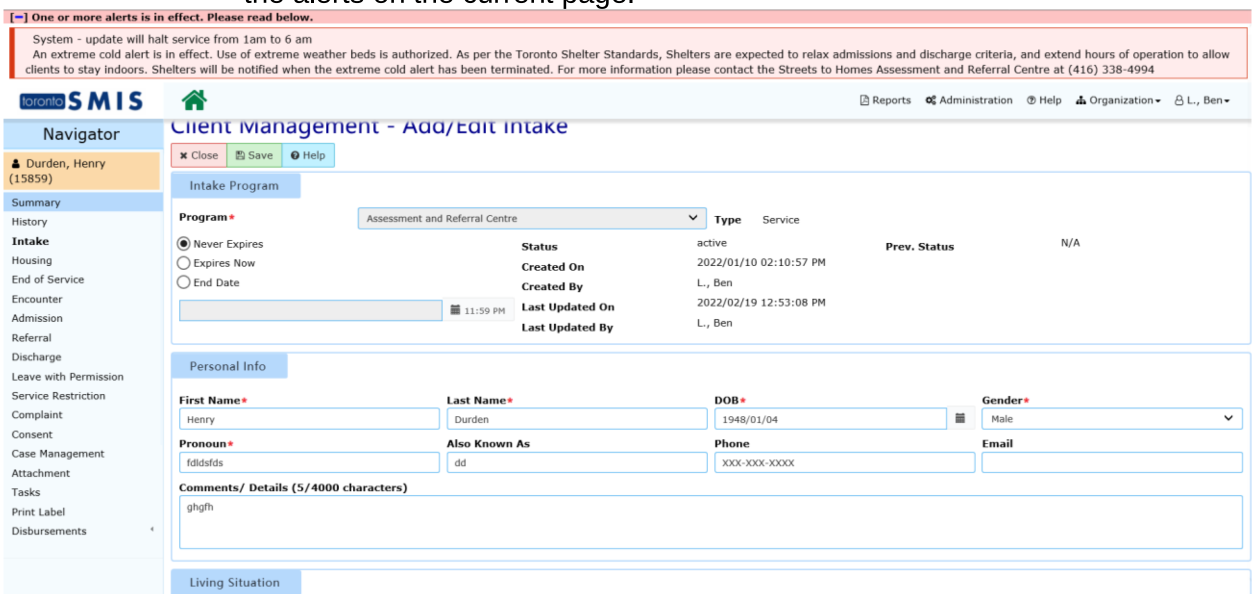
1. **Introduced Significant Accessibility Enhancements to the SMIS Intake Module**
   a. This Release includes a significant number of accessibility enhancements to the SMIS user interface, in compliance with the (1) Accessibility for Ontarians with Disabilities Act standards and (2) City of Toronto 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.



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.

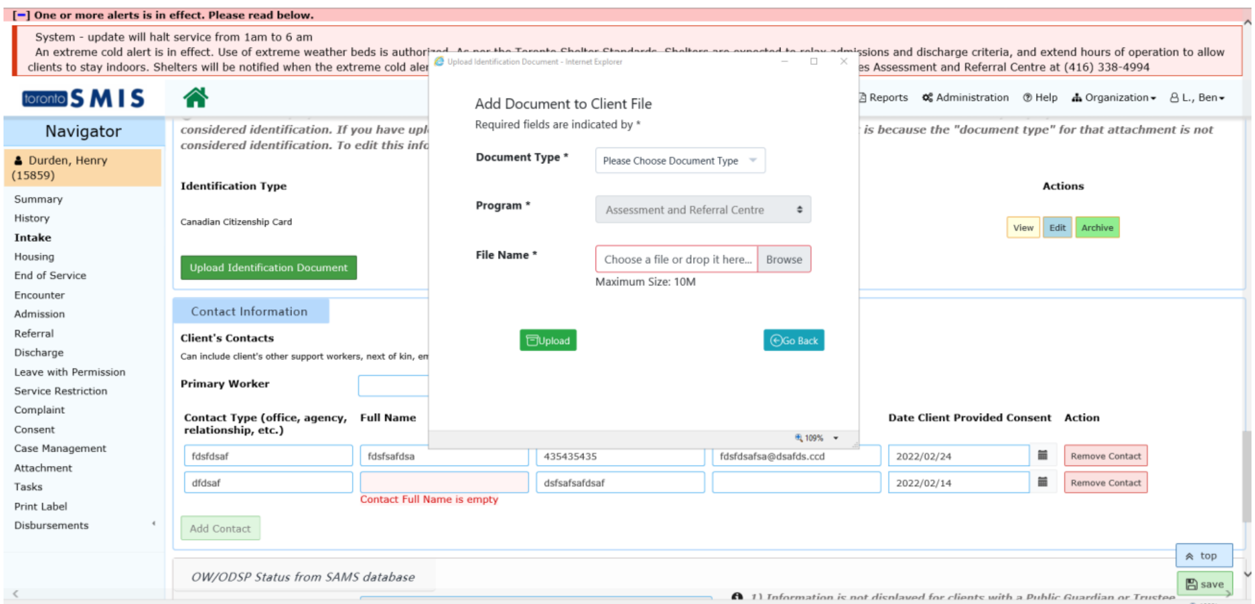


2. Introduced Real-Time Validation to the [Contacts] Section in the SMIS Intake Module

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.

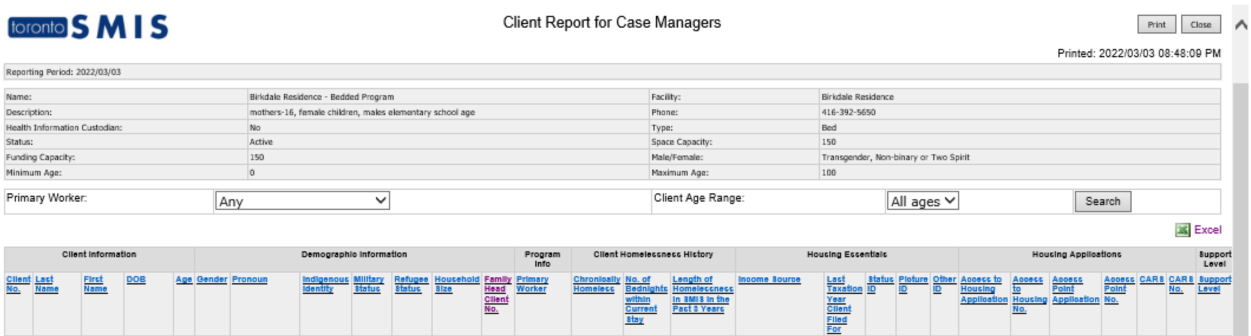
3. **Migrated 3 fields from the SMIS Intake Module to the New Housing Module**
    a. Three fields have been permanently migrated from the SMIS Intake Module to the New Housing Module. This includes:
        i. The [Estimated Monthly Income] field
        ii. The [Last Taxation Year a Client Has Filed 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.


Client Report for Case Managers

Print Close

Printed: 2022/03/03 08:48:09 PM

Reporting Period: 2022/03/03

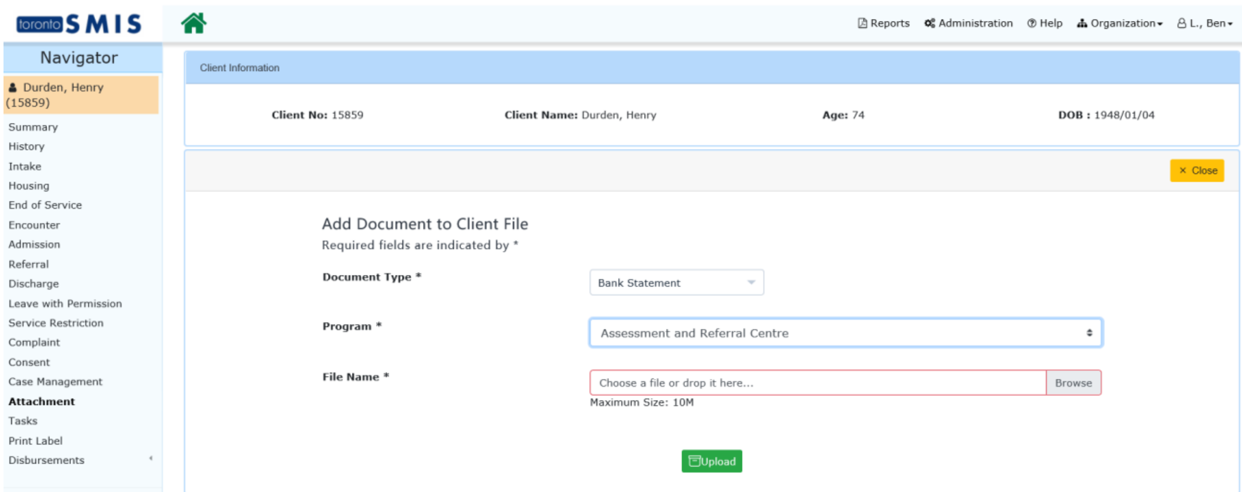
Name:	Birkdale Residence - Bedded Program	Facility:	Birkdale Residence
Description:	mothers-16, female children, males elementary school age	Phone:	416-392-5650
Health Information Custodian:	No	Type:	Bed
Status:	Active	Space Capacity:	150
Funding Capacity:	150	Male/Female:	Transgender, Non-binary or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

Primary Worker:	Any	Client Age Range:	All ages	Search

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 SMIS in the Past 3 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.	CARS	CARS No.	Support Level

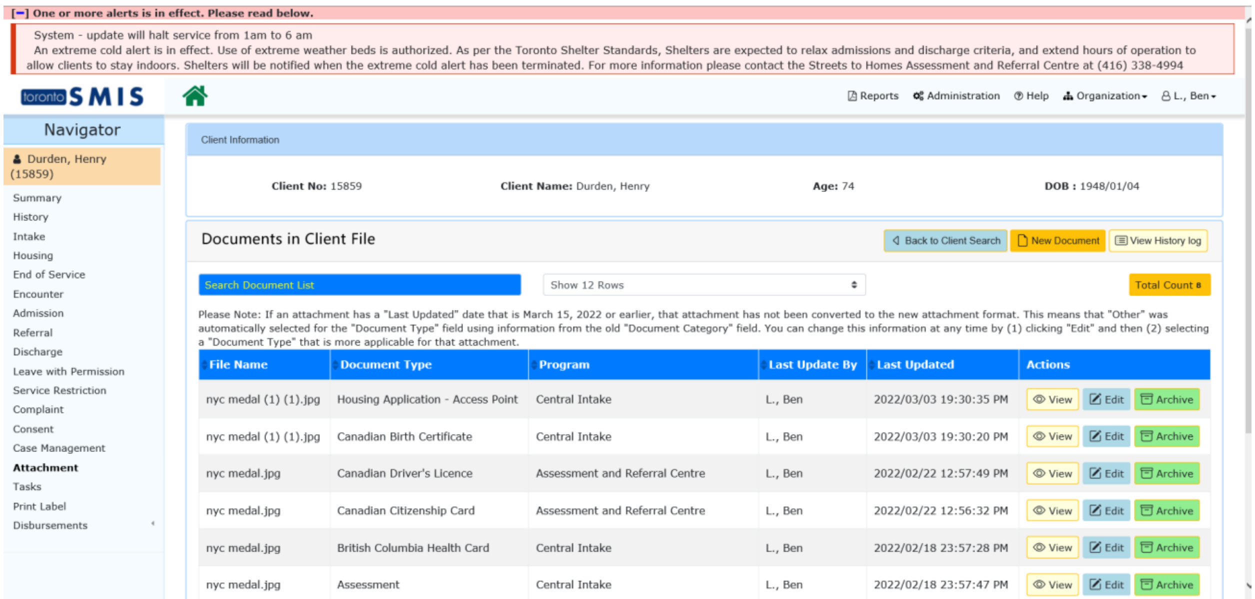
6. **Introduced Major Enhancements to the Attachment Module**
   a. Improved the options for uploading attachments, including:
      i. Removed the previous [Document Category] field (which listed 12 options) and replaced it with a mandatory [Document Type] field (which now lists 125 options). This allows 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.



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).

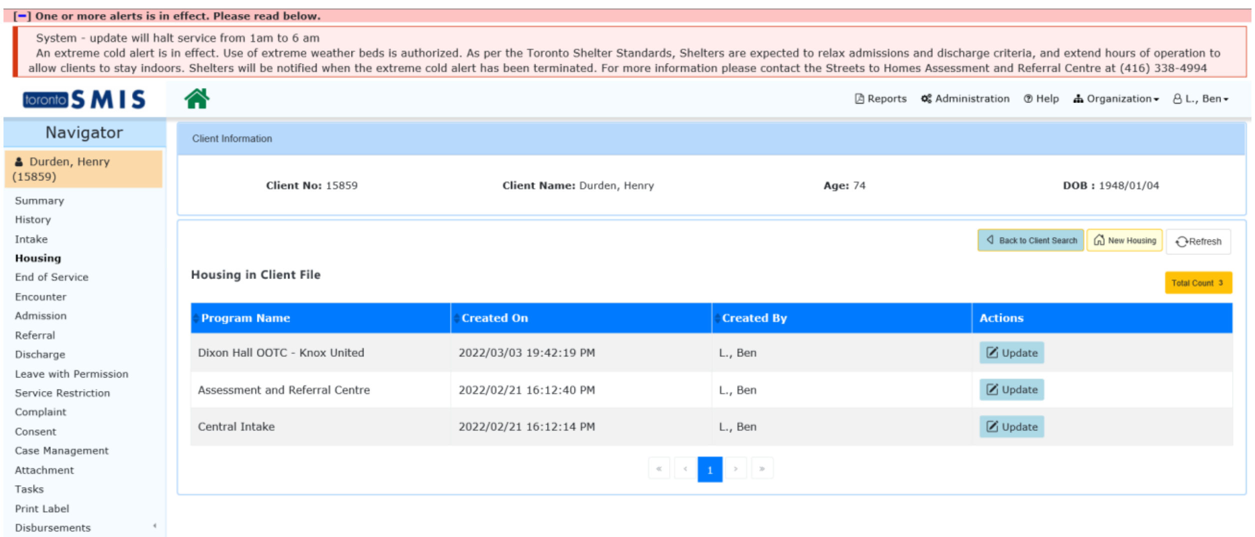
c. Improved the records list table for attachments, including:
    i. Added a search bar to the records list table that searches across all displayed columns.
    ii. Added display row controls to the records list table, allowing the user to select the number of rows that they prefer to have displayed 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.



[−] 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
Reports
Administration
Help
Organization
L., Ben
Navigator
Durden, Henry (15859)
Summary
History
Intake
Housing
End of Service
Encounter
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 8
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.



    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.

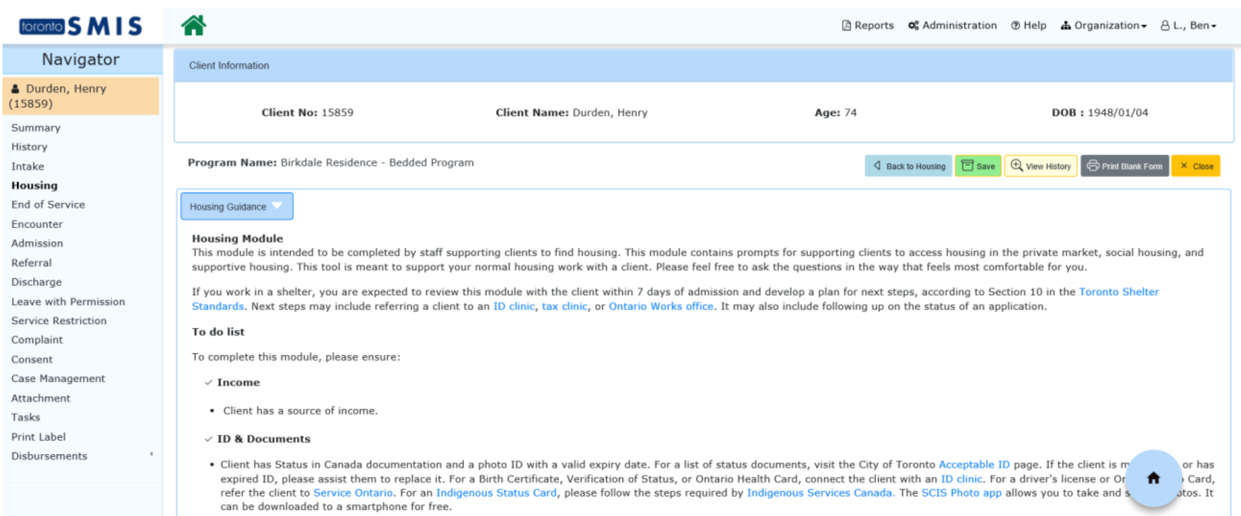
8. Introduced History Logs to the attachments module and housing module

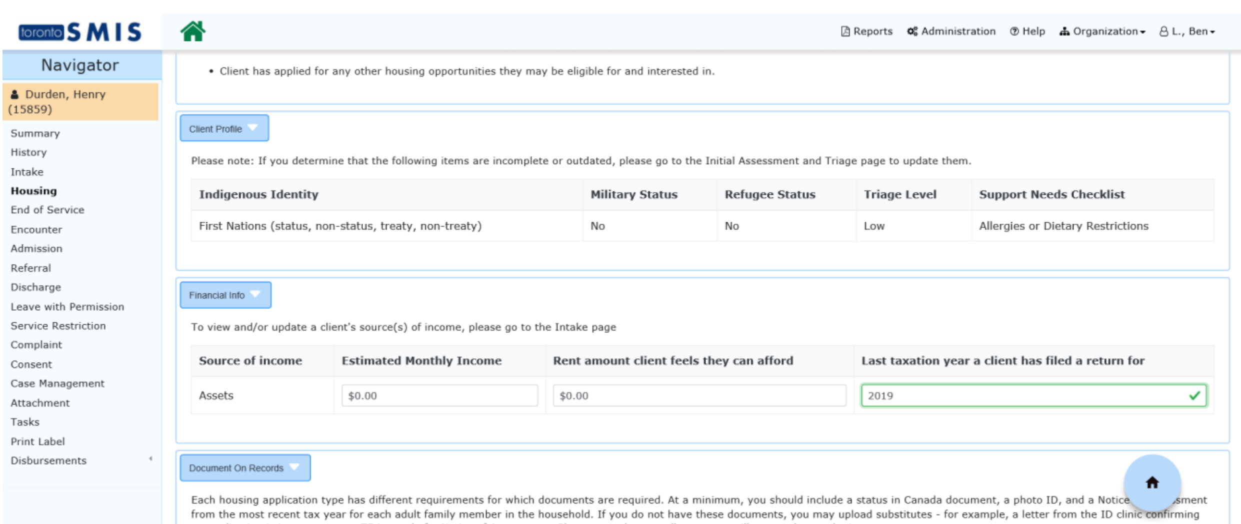
a. Added a [History Log] to the (1) attachments module and (2) housing module, which allows the user to view a record of all changes made to any fields within the corresponding record, over the past 365 days. The function is accessed through the [History Log] Button at the top bar of the record. This 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:





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.