To Create a New Client (Intake)

Updated on September 2023

Home > Client Management (Search Client) > New Client

Business Purpose:

There are instances when a client you are looking for does not appear in the client search list after performing a search. This indicates that the client has never been in the Toronto Shelter System so you will need to create the initial client record before anything can be done with that client within SMIS.

This New Client screen will allow you to create the initial client record plus the intake record for the selected program. It is recommended you enter as much information as you have available for the client. Mandatory fields are marked with an * and MUST be filled to Save the client information. Also, it allows you to request a bed for a single or family client if a bed is being requested from a service program (e.g. SHARC, Central Intake, Drop-Ins).

Bed/Room program - Intake screen will cover the following sections:

- **A bed:** Intake Program, Notice of collection, Personal Information, Living Situation, Length of Homelessness (the section available based on the program settings), Consent (the fields active only after an intake is saved), Client Details, Support Needs, Income, Identification and Contact Information.
- **A room:** Intake Program, Notice of collection, Personal Information, Living Situation, Length of Homelessness, Family, Consent (can be signed only after the intake saved), Client Details, Support Needs, Income, Identification and Contact Information.

Service Program - Intake screen will cover the following sections:

- Intake Program, Notice of Collection, Personal Information, Living Situation, Length of Homelessness, Consent, Family, Client Details, Support Needs, Income, Identification and Contact Information.

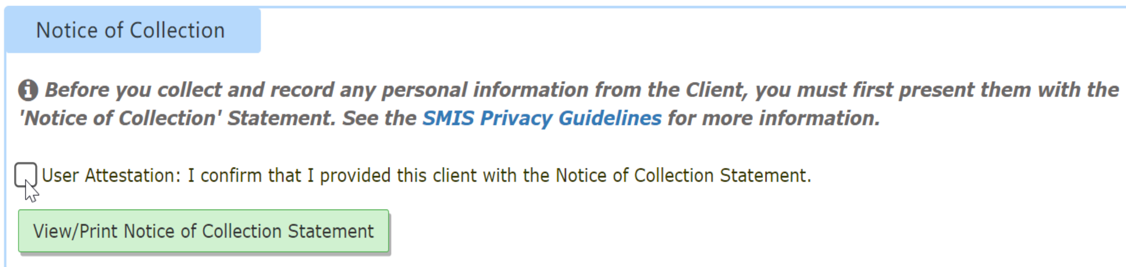
How to:

1. Click on the 

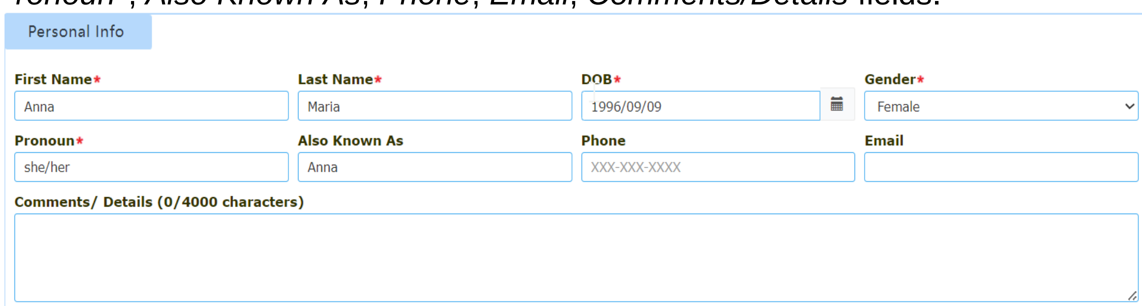
button.

2. Select a program (Bed or Service).

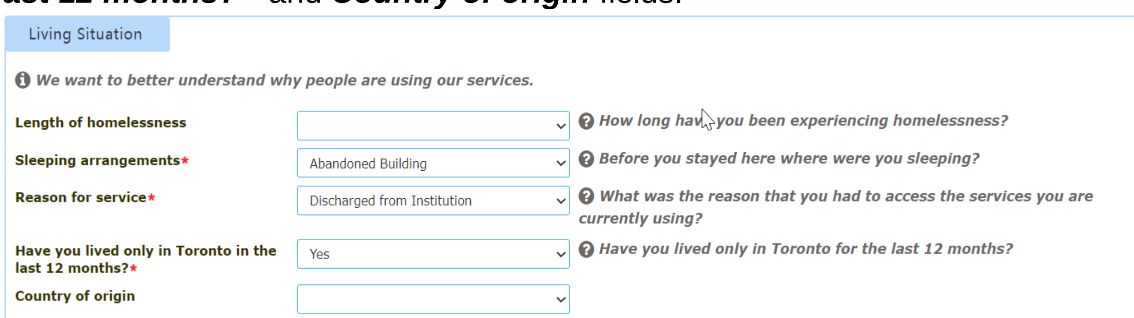
3. **Notice of collection** section (mandatory). Before collecting a client's personal information, the agent must provide the client with Notice of Collection by clicking on the View/Print Notice of Collection Statement button and then select the checkbox.



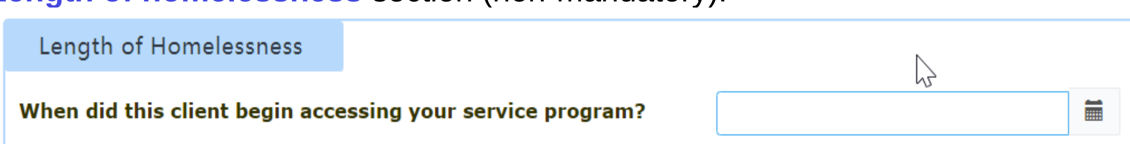
4. **Personal Info** section (mandatory): *First Name*, Last Name**, *DOB**, *Gender**, *Pronoun**, *Also Known As*, *Phone*, *Email*, *Comments/Details* fields.



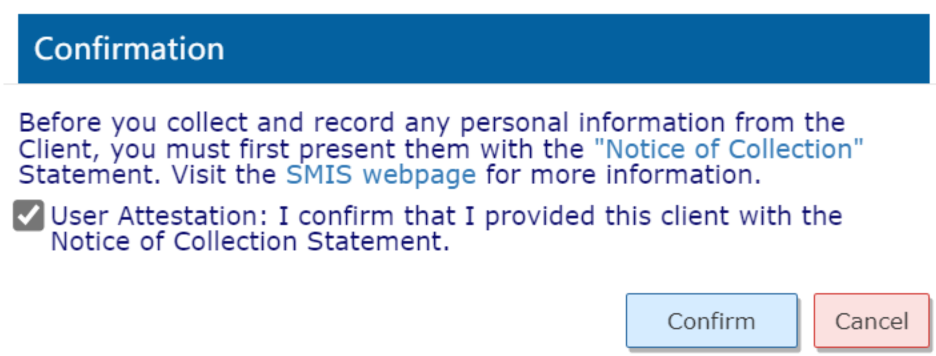
5. **Living Situation** section (mandatory): ***Length of homelessness***, ***Sleeping arrangements****, ***Reason for service****, ***Have you lived only in Toronto in the last 12 months? **** and ***Country of origin*** fields.



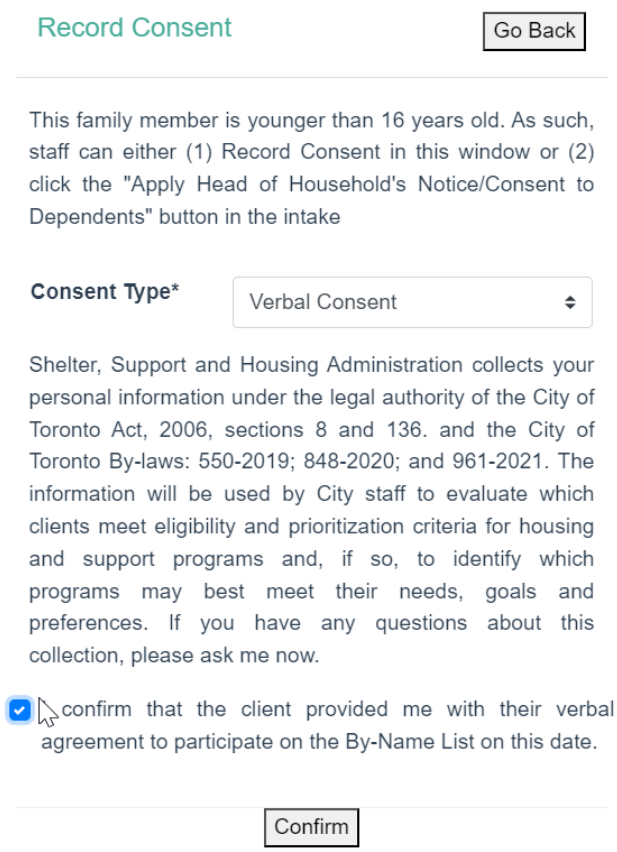
6. **Length of homelessness** section (non-mandatory):



7. **Family** section:
   a. There is an option to add and remove family members. To add a new family member, click on the Add Family Member button, fill in the Last name and First name fields and click on the button.
   b. If this is an existing client, click on the Add Existing link.
   c. If this is a new client, click on the icon. Enter Last Name, First Name, Gender, DOB. Then click on the "Save" button.
   d. Enter Relationship information and save.
   e. If NOC and BNL are not attested and recorded a warning message should be displayed
   f. If you click on the Confirm Override for ALL Remaining Warnings and Save button, it will override all warnings and save family member's information as is.
   g. If you click on Attest and Record buttons, the following pop-up windows will appear:
   Attest:



   Record:

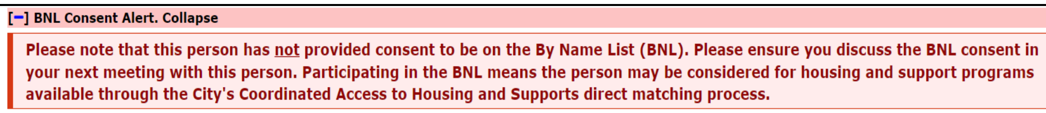


h. If a family member is a dependant, click on the Apply Head of Household's Notice/Consents to Dependents button and then click on the Save button. ***Notice of the Collection*** and ***By Name list*** status will change to Complete and Active.

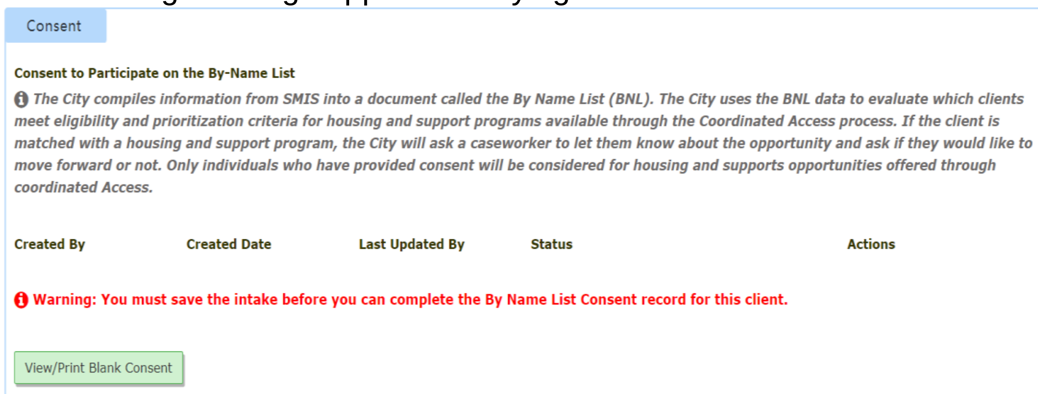
i. To remove a family member, click of on the Remove Member button and then click on the Save button.

j. Click on the History button. A new pop-up window will display the Client Management - Family Intake History page.

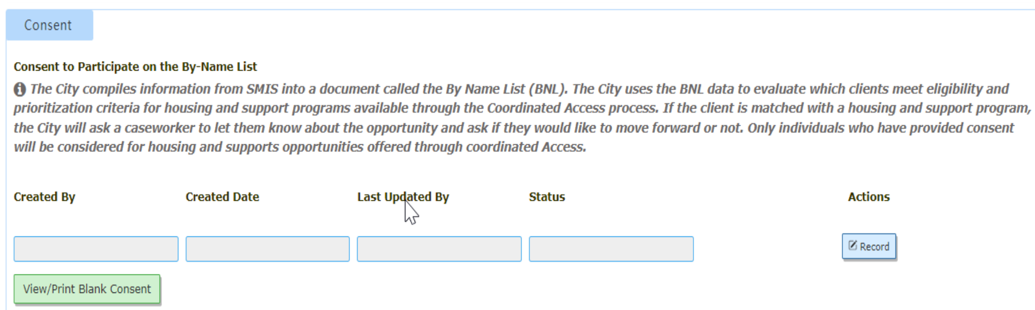
8. **Consent** (non-mandatory) section:
    - BNL alert appears at the top of the Client Management - Add/Edit Intake page in the case when a client is not notified and has not signed the BNL consent.

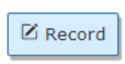


- The warning message appears notifying the user to save the intake first:



- After saving the Intake record, the Consent fields becomes available/active:



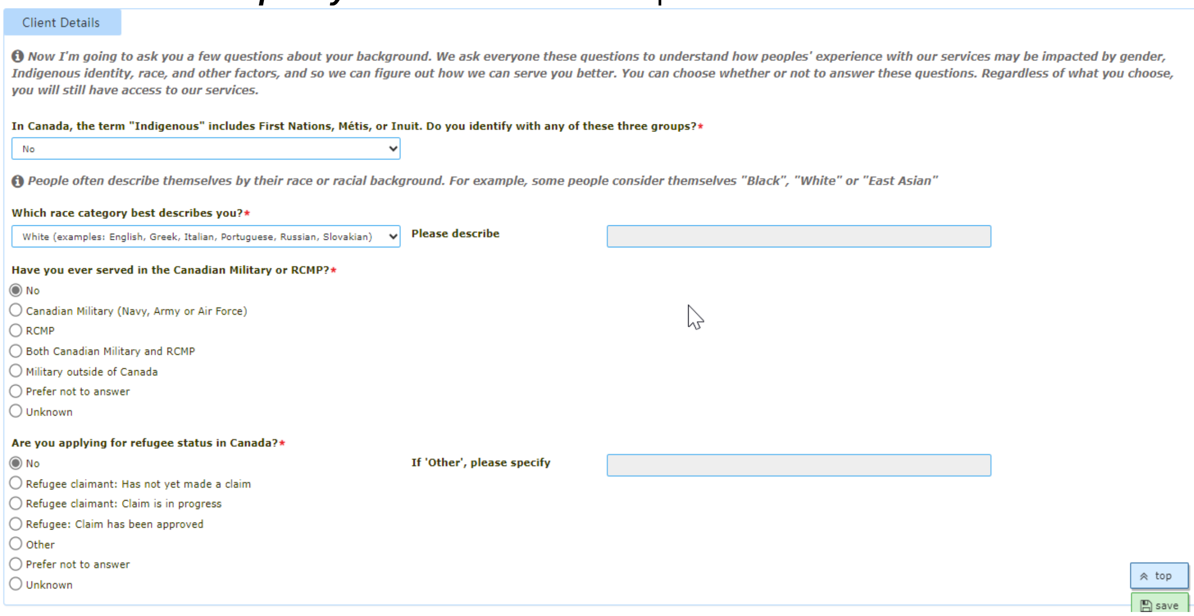
1) Click on the 

button. A New pop-up window will open.
2) Select ***Consent Type*** from drop-down list (for example, *Verbal Consent*), click on the ***checkbox*** and Confirm button and BNL consent will save the record successfully.

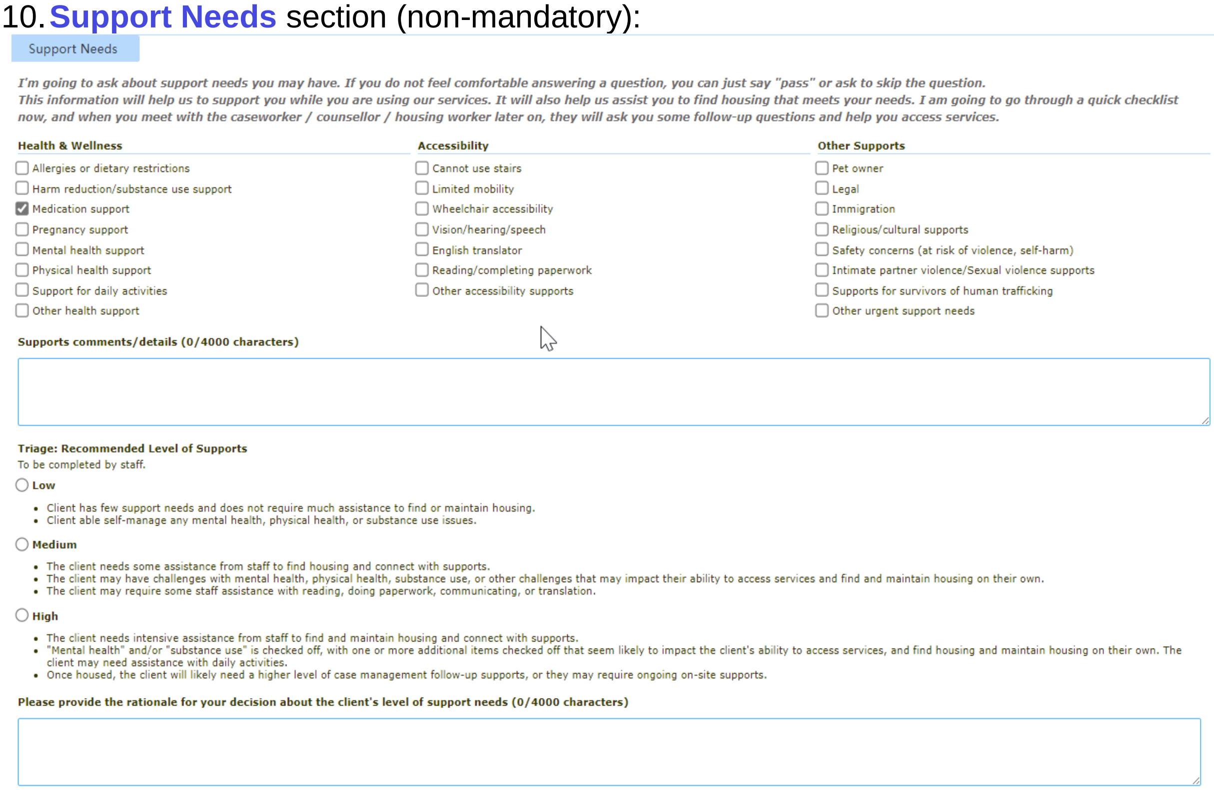
9. **Client Details** section (mandatory).

- next to the ***In Canada, the term "Indigenous" includes First Nations, Métis, or Inuit. Do you identify with any of these three groups?*** * field, select one of the options from the drop-down list.
- next to the ***Which race category best describes you?*** * field, select one of the options from the drop-down list.
  - If ***Not listed, please describe*** option is selected, enter text description next to the ***Please describe*** field as it becomes required.
- next to the ***Have you ever served in the Canadian Military or RCMP?*** * field, select one of the options from the drop-down list.

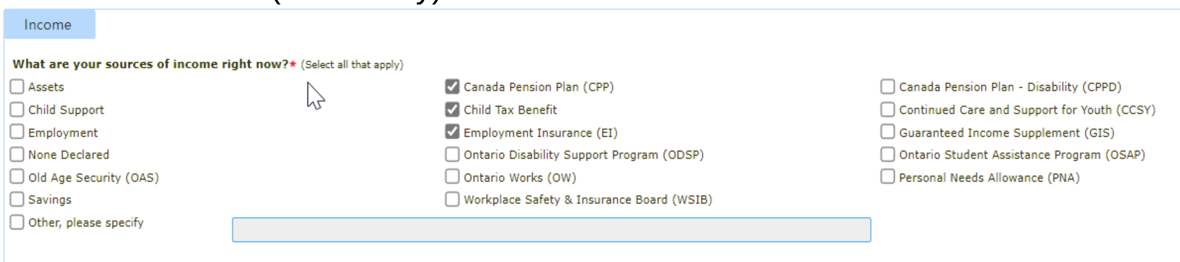
- next to the ***Are you applying for refugee status in Canada?*** * field, select one of the options from the drop-down list.
  - If ***Other*** option is selected, enter a text next to the ***If 'Other', please specify*** field as it becomes required field.



10. **Support Needs** section (non-mandatory):



11. **Income** section (mandatory):



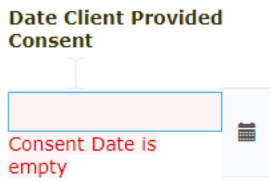
12. **Identification** section (non-mandatory):

   a. Click on [Upload Identification Document] button. A new pop-up window will appear.
   b. Browse a document/picture attachment
   c. Select a Document Type from drop-down list
   d. Click on Upload button and close it.
   e. After an Identification document is saved there are three [View] [Edit] [Archive] buttons will display
   f. Click on the View button – a new pop-up window with document file attachment will appear
   g. Click on the Edit button – a new pop-up window will appear. Where you can enter or update/change the following parameters: Document Type*, Expiry Date*, Program*, File Name*. And then click on Update button.
   h. Click on the Archive – a confirmation window will appear. Click on OK or Cancel. If clicked on the OK – it will deactivate the attachment, no longer will be displayed and will be moved to Attachments module.

13. **Contact Information** section (non-mandatory):

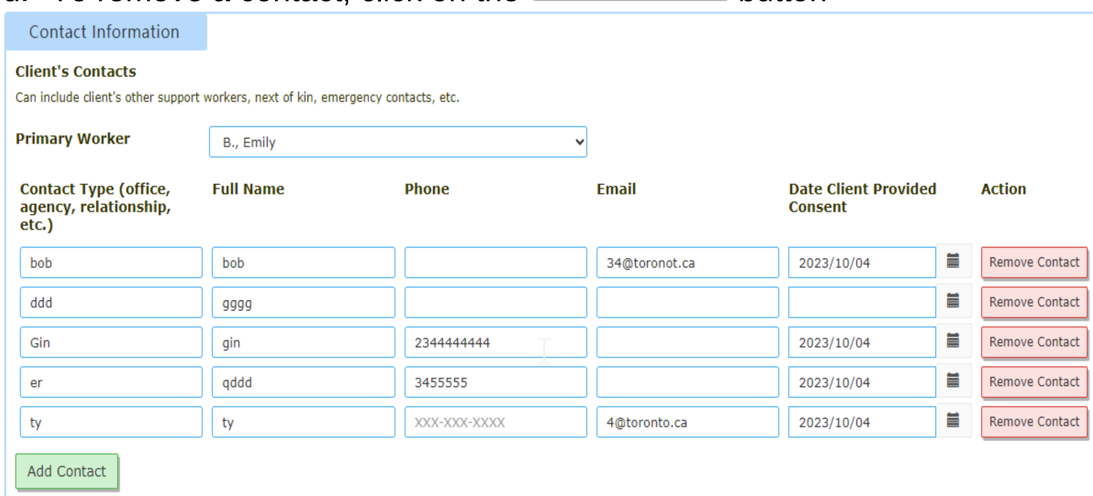
   a. Select a ***primary worker*** from drop-down list and click on save.
   b. There is an option to add other support worker/next of kin/emergency contact.
   c. Click on the green Add Contact button and enter ***Contact Type (office, agency, relationship, etc.), Full Name***, ***Phone*** or ***Email*** and ***Date Client Provided Consent*** fields and save. The contact information will be successfully saved.
      - In the case you have entered only contact type ad full name and save, the system will display a warning with a message to enter contact's phone number or email address. You can override the warning by clicking on the [Confirm Override for ALL Remaining Warnings and Save] button and save the information as is.

- Or you can enter phone number or email address and click on save button. The system will display a warning with a message to enter a consent date.

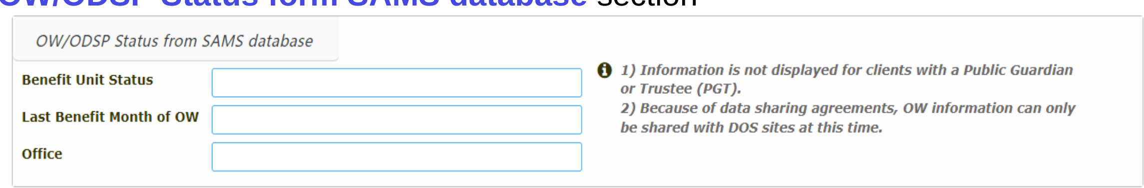


- Enter ***Consent date*** by clicking on the and save. The contact records will be saved successfully.

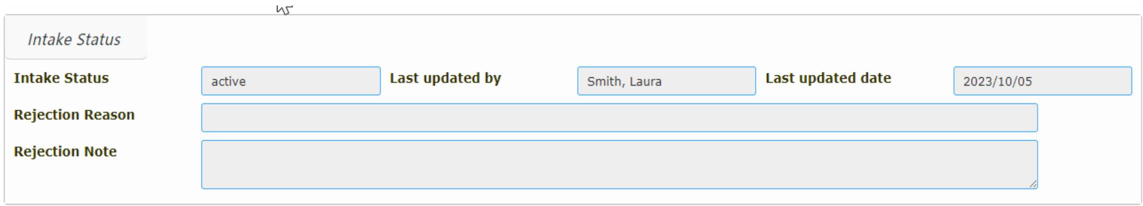
d. To remove a contact, click on the Remove Contact button



14. **OW/ODSP Status form SAMS database** section



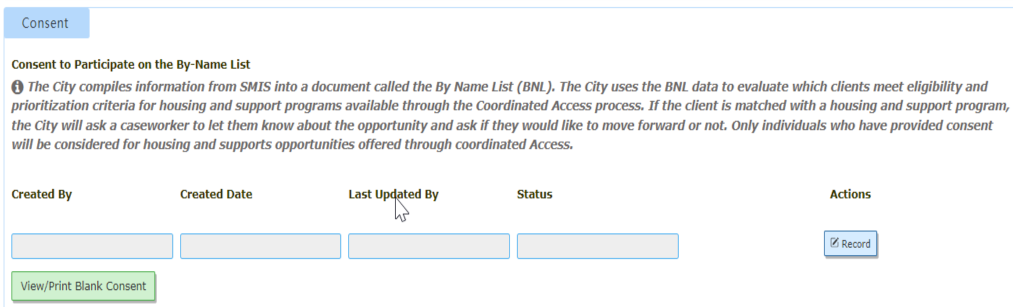
15. **Intake Status** section:



16. If necessary, enter any other information in all other fields if not mentioned above. Whenever available, use the drop-down arrow, radio buttons, check boxes, free text next to the selected field.

17. Select the Save action button to save the information entered on the new intake form.

18. Once the Intake is saved, a **Consent** section will become active (mandatory field). The following fields will show up: *Created by*, *Created Date*, *Last Updated By*, *Status* and the Record button will appear.



3) Click on the Record button. A New pop-up window will open.
4) Select ***Consent Type**** from drop-down list (for example, *Verbal Consent*), click on the ***checkbox*** and Confirm button and BNL consent will save the record successfully.

19. If the source program is a service program, then there will be a Request Bed button on a new intake screen. Click the Request Bed button if a room/bed is being requested. For bed programs, the bed request is automatically generated when an intake is created and no Request Bed button is visible but Admission.

Important Notes:

1. A **BNL alert** will appear once a new Intake started (consent to participate on the BNL should be signed once). A message will appear if BNL has not yet been signed.

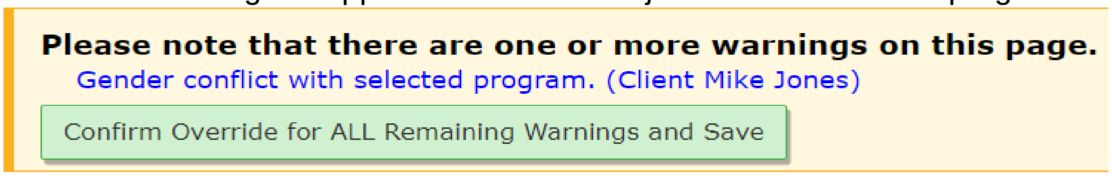
[−] BNL Consent Alert. Collapse

Please note that this person has not provided consent to be on the By Name List (BNL). Please ensure you discuss the BNL consent in your next meeting with this person. Participating in the BNL means the person may be considered for housing and support programs available through the City's Coordinated Access to Housing and Supports direct matching process.

2. The Warning message is presented in the Contest section.

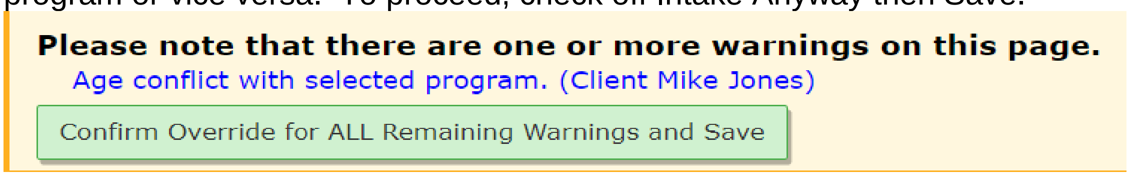
Warning: You must save the intake before you can complete the By Name List Consent record for this client.

3. A Gender warning will appear if a male client joins a female Intake program.



Female program and vice versa. Transgender clients can go in all programs. To proceed, check off Intake anyway then Save.

4. An Age Conflict warning will appear if the age of the client does not correspond with the selected program. For instance, if a Youth has an Intake into an Adult program or vice versa. To proceed, check off Intake Anyway then Save.



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5. Note that you cannot revise the program from one type to another (e.g. from a service Program to a bed Program) after creation of the Intake. You must do a new intake to switch a client to another type of Program or you can refer from one program to another.

6. **Length of Homelessness** section is available in the Intake page based on the program settings.

7. **Consent** section:
   - Once BNL consent is signed and saved the field is not displaying in the Intake page.

8. There may be times where a client can provide additional information, they have not already provided to you. An update can occur at any time for a client with an active intake within the Client Management module. Once the initial client information has been captured and saved within SMIS, you will simply need to find the client once again via a client search and select the Intake option within the Navigator to view or perform updates in the intake page.

9. Family section. If selected client member is already in another family and save button is clicked, an error message is displayed at the top of the intake screen and it appears in the Family section as well.

10. Information for all 3 fields listed below the OW/ODSP Status tab will

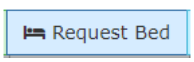
automatically be populated within 24 hours after an intake has been saved within SMIS.

11. Once an intake for a program has been saved, you will be given new options such as: Request a Bed (for service programs) or simply admit the single client to your bed program by clicking the Admission action button (for bed programs).

12. The Admission button option is not available when **processing** an intake for a service program. The term “admitted” in SMIS refers to placing a client in a bed.

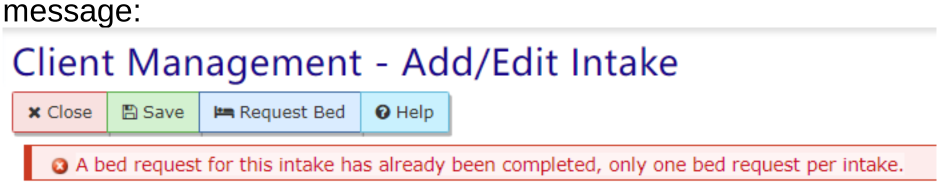
13. If a new intake is initiated into a program to which a client has already had an intake, the new intake will retrieve most of the data from the previous intake (except for "Have you lived only in Toronto in the last 12 months?") and present it on the screen. Your most recent intake within the previous 90 days is used. If an intake was not completed for that client and that program in the last 90 days, then a blank intake is shown.

14. The Request Bed (Room) button is only available in some Service Programs (e.g. SHARC, Central Intake), for the head of the family (i.e. one room request per family intake).

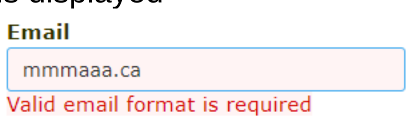
15. If 

button is clicked, Program's Service Queue screen is displayed, and client is added to the Service Queue.

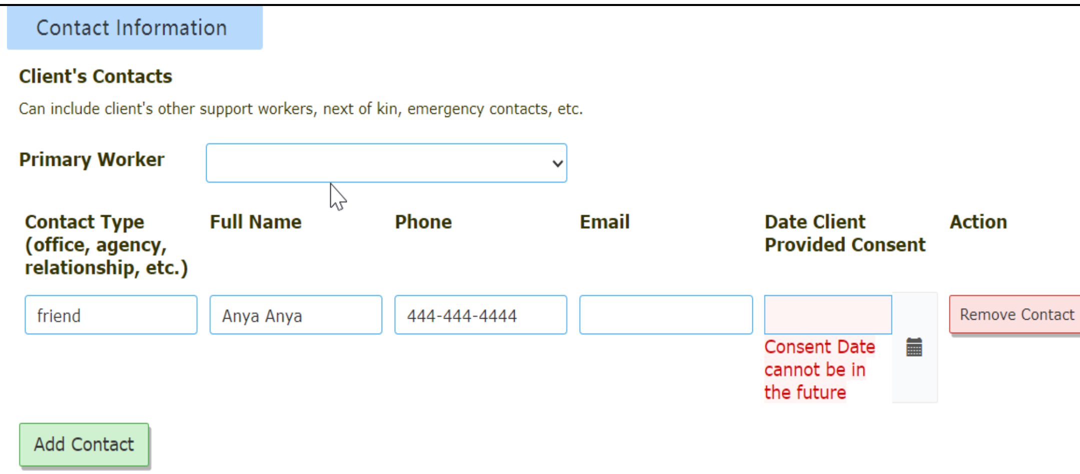
16. If you click Request a Bed and then click a second time, you will get an error message:



17. **Personal Info** section. Note that if email field is invalid format, an error message is displayed



18. **Contact Information** section. Note that an error message appears if ***Date Client Provided Consent*** field is blank.


Contact Information
Client's Contacts
Can include client's other support workers, next of kin, emergency contacts, etc.
Primary Worker
Contact Type (office, agency, relationship, etc.)
Full Name
Phone
Email
Date Client Provided Consent
Action
friend
Anya Anya
444-444-4444
Consent Date cannot be in the future
Remove Contact
Add Contact