
To Create a New Client (Intake)

Updated on September 2023

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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).

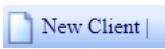
Bed/Room program - Intake screen will cover the following sections:

- **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).

- 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.

Notice of Collection

i Before you collect and record any personal information from the Client, you must first present them with the 'Notice of Collection' Statement. See the [SMIS Privacy Guidelines](#) for more information.

User Attestation: I confirm that I provided this client with the Notice of Collection Statement.

View/Print Notice of Collection Statement

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

Personal Info

First Name*	Last Name*	DOB*	Gender*
<input type="text" value="Anna"/>	<input type="text" value="Maria"/>	<input type="text" value="1996/09/09"/>	<input type="text" value="Female"/>
Pronoun*	Also Known As	Phone	Email
<input type="text" value="she/her"/>	<input type="text" value="Anna"/>	<input type="text" value="XXX-XXX-XXXX"/>	<input type="text"/>

Comments/ Details (0/4000 characters)

- 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.

Living Situation

i We want to better understand why people are using our services.




Length of homelessness	<input type="text"/>	? How long have you been experiencing homelessness?
Sleeping arrangements*	<input type="text" value="Abandoned Building"/>	? Before you stayed here where were you sleeping?
Reason for service*	<input type="text" value="Discharged from Institution"/>	? What was the reason that you had to access the services you are currently using?
Have you lived only in Toronto in the last 12 months?*	<input type="text" value="Yes"/>	? Have you lived only in Toronto for the last 12 months?
Country of origin	<input type="text"/>	

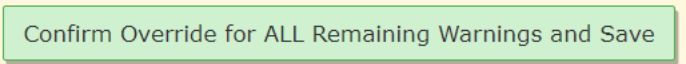
- Length of homelessness** section (non-mandatory):

Length of Homelessness

When did this client begin accessing your service program?

7. **Family** section:

- a. There is an option to add and remove family members. To add a new family member, click on the  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  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:](#)

Confirmation

Before you collect and record any personal information from the Client, you must first present them with the "Notice of Collection" Statement. Visit the [SMIS webpage](#) for more information.

- User Attestation: I confirm that I provided this client with the Notice of Collection Statement.

Confirm

Cancel

[Record:](#)

Record Consent

Go Back

This family member is younger than 16 years old. As such, staff can either (1) Record Consent in this window or (2) click the "Apply Head of Household's Notice/Consent to Dependents" button in the intake

Consent Type*

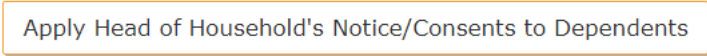
Verbal Consent

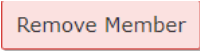
Shelter, Support and Housing Administration collects your personal information under the legal authority of the City of Toronto Act, 2006, sections 8 and 136. and the City of Toronto By-laws: 550-2019; 848-2020; and 961-2021. The information will be used by City staff to evaluate which clients meet eligibility and prioritization criteria for housing and support programs and, if so, to identify which programs may best meet their needs, goals and preferences. If you have any questions about this collection, please ask me now.

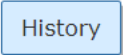
confirm that the client provided me with their verbal agreement to participate on the By-Name List on this date.

Confirm

h. If a family member is a dependant,

click on the  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  button and then click on the [Save](#) button.

j. Click on the  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.

[-] 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.

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

The screenshot shows a 'Consent' form with the following content:

Consent to Participate on the By-Name List

ⓘ The City compiles information from SMIS into a document called the By Name List (BNL). The City uses the BNL data to evaluate which clients meet eligibility and prioritization criteria for housing and support programs available through the Coordinated Access process. If the client is matched with a housing and support program, the City will ask a caseworker to let them know about the opportunity and ask if they would like to move forward or not. Only individuals who have provided consent will be considered for housing and supports opportunities offered through coordinated Access.

Created By	Created Date	Last Updated By	Status	Actions
ⓘ Warning: You must save the intake before you can complete the By Name List Consent record for this client.				

[View/Print Blank Consent](#)

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

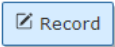
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Created By	Created Date	Last Updated By	Status	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Record

[View/Print Blank Consent](#)

- 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.

Client Details

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

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

People often describe themselves by their race or racial background. For example, some people consider themselves "Black", "White" or "East Asian"

Which race category best describes you?*

Please describe

Have you ever served in the Canadian Military or RCMP?*

No
 Canadian Military (Navy, Army or Air Force)
 RCMP
 Both Canadian Military and RCMP
 Military outside of Canada
 Prefer not to answer
 Unknown

Are you applying for refugee status in Canada?*

No **If 'Other', please specify**
 Refugee claimant: Has not yet made a claim
 Refugee claimant: Claim is in progress
 Refugee: Claim has been approved
 Other
 Prefer not to answer
 Unknown

[top](#)
[save](#)

10. Support Needs section (non-mandatory):

Support Needs

I'm going to ask about support needs you may have. If you do not feel comfortable answering a question, you can just say "pass" or ask to skip the question. This information will help us to support you while you are using our services. It will also help us assist you to find housing that meets your needs. I am going to go through a quick checklist now, and when you meet with the caseworker / counsellor / housing worker later on, they will ask you some follow-up questions and help you access services.

Health & Wellness	Accessibility	Other Supports
<input type="checkbox"/> Allergies or dietary restrictions <input type="checkbox"/> Harm reduction/substance use support <input checked="" type="checkbox"/> Medication support <input type="checkbox"/> Pregnancy support <input type="checkbox"/> Mental health support <input type="checkbox"/> Physical health support <input type="checkbox"/> Support for daily activities <input type="checkbox"/> Other health support	<input type="checkbox"/> Cannot use stairs <input type="checkbox"/> Limited mobility <input type="checkbox"/> Wheelchair accessibility <input type="checkbox"/> Vision/hearing/speech <input type="checkbox"/> English translator <input type="checkbox"/> Reading/completing paperwork <input type="checkbox"/> Other accessibility supports	<input type="checkbox"/> Pet owner <input type="checkbox"/> Legal <input type="checkbox"/> Immigration <input type="checkbox"/> Religious/cultural supports <input type="checkbox"/> Safety concerns (at risk of violence, self-harm) <input type="checkbox"/> Intimate partner violence/Sexual violence supports <input type="checkbox"/> Supports for survivors of human trafficking <input type="checkbox"/> Other urgent support needs

Supports comments/details (0/4000 characters)

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

Low

- Client has few support needs and does not require much assistance to find or maintain housing.
- Client able self-manage any mental health, physical health, or substance use issues.

Medium

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

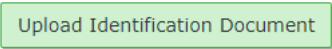
High

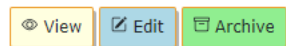
- The client needs intensive assistance from staff to find and maintain housing and connect with supports.
- "Mental health" and/or "substance use" is checked off, with one or more additional items checked off that seem likely to impact the client's ability to access services, and find housing and maintain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

Please provide the rationale for your decision about the client's level of support needs (0/4000 characters)

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


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

- Click on  button. A new pop-up window will appear.
- Browse** a document/picture attachment
- Select a Document Type from drop-down list
- Click on **Upload** button and close it.
- After an Identification document is saved there are three



- buttons will display
- Click on the **View** button – a new pop-up window with document file attachment will appear
- 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.
- 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):

- Select a **primary worker** from drop-down list and click on save.
- There is an option to add other support worker/next of kin/emergency contact.
- 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 and 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  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.

Date Client Provided Consent

Consent Date is empty

- 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

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
<input type="text" value="bob"/>	<input type="text" value="bob"/>	<input type="text"/>	<input type="text" value="34@toronot.ca"/>	<input type="text" value="2023/10/04"/>	<input type="button" value="Remove Contact"/>
<input type="text" value="ddd"/>	<input type="text" value="gggg"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Remove Contact"/>
<input type="text" value="Gin"/>	<input type="text" value="gin"/>	<input type="text" value="2344444444"/>	<input type="text"/>	<input type="text" value="2023/10/04"/>	<input type="button" value="Remove Contact"/>
<input type="text" value="er"/>	<input type="text" value="qddd"/>	<input type="text" value="3455555"/>	<input type="text"/>	<input type="text" value="2023/10/04"/>	<input type="button" value="Remove Contact"/>
<input type="text" value="ty"/>	<input type="text" value="ty"/>	<input type="text" value="XXX-XXX-XXXX"/>	<input type="text" value="4@toronto.ca"/>	<input type="text" value="2023/10/04"/>	<input type="button" value="Remove Contact"/>

14. OW/ODSP Status form SAMS database section

OW/ODSP Status from SAMS database

Benefit Unit Status

Last Benefit Month of OW

Office

1) Information is not displayed for clients with a Public Guardian or Trustee (PGT).
2) Because of data sharing agreements, OW information can only be shared with DOS sites at this time.

15. Intake Status section:

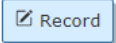
Intake Status

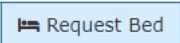
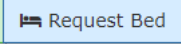
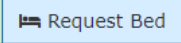
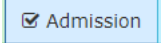
Intake Status **Last updated by** **Last updated date**

Rejection Reason

Rejection Note


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

- Click on the  button. A New pop-up window will open.
- 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.

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

Important Notes:

- 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.

- 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.

Please note that there are one or more warnings on this page.

Gender conflict with selected program. (Client Mike Jones)

Confirm Override for ALL Remaining Warnings and Save

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.

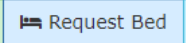
Please note that there are one or more warnings on this page.

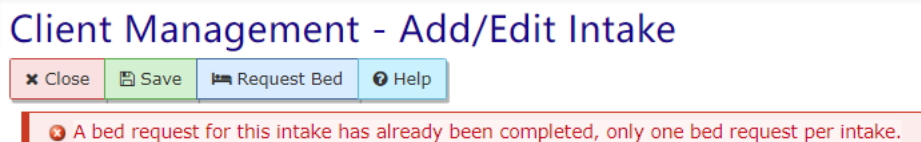
Age conflict with selected program. (Client Mike Jones)

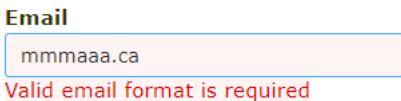
Confirm Override for ALL Remaining Warnings and Save

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


The screenshot shows an "Email" field with the text "mmmaaa.ca" entered. Below the field, a red error message reads: "Valid email format is required".
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

<input type="text" value="friend"/>	<input type="text" value="Anya Anya"/>	<input type="text" value="444-444-4444"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Remove Contact"/>
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Consent Date cannot be in the future