To Edit a Client Intake

Updated on November 2023

Home > Client Management (Search Client) > Intake > Update

Business Purpose:

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 perform updates in the intake page.

Bed/Room program - Intake screen will cover the following sections:
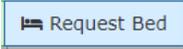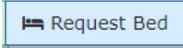- **A bed:** Intake Program, Notice of collection, Personal Information, Living Situation, Length of Homelessness (the section available based on the program settings), Consent (the fields active only after an intake is saved), Client Details, Support Needs, Income, Identification and Contact Information.
- **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 Update button. **Client Management – Add/Edit Intake** page will display.

2. There are four buttons on the Client Management – Add/Edit Intake page:
   - Close – closes the Client Management – Add/Edit Intake page.
   - Save – saves the entered information.
   - Request Bed – a button to request a bed. Takes the user to the Program Management – Service Queue page.
   - Admission – a button to admit the intake. Takes the user to the Client Management – Admission page.
   - Help – opens a new window - Client Intake/Update document guide.

3. Enter or update any information in all fields in the **Program**, **Personal Information**, **Living Situation**, **Consent**, **Length of Homelessness**, **Family**, **Client Details**, **Support Needs**, **Identification**, **Income**, **Contact information and Comments/Details** tabs on the screen as necessary. Whenever available, use the drop-down arrow, radio buttons, check boxes, free text next to the selected field.

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

5. 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].
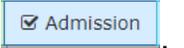
Important Notes:

1. A **BNL alert** will appear once a new Intake started (consent to participate on the BNL should be signed once). The message appears if there are no intake records for the client.

> **[−] BNL Consent Alert. Collapse**
>
> Please note that this person has <u>not</u> 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. 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]

3. 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.

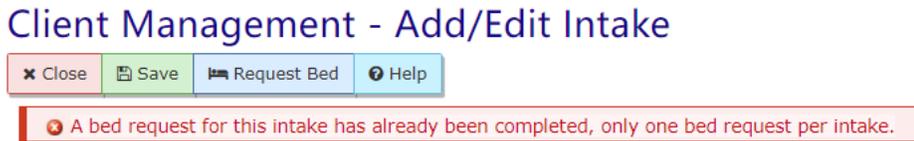> **Please note that there are one or more warnings on this page.**
> Age conflict with selected program. (Client Mike Jones)
>
> [Confirm Override for ALL Remaining Warnings and Save]

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.

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 bed program has been saved, you will be given new options such as: Begin a Family intake (for family shelters) or simply admit the single client to your bed program by clicking the Admission action button.

12. The Admission action 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 mandatory fields) 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 [Request Bed] 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:

Client Management - Add/Edit Intake

| ✕ Close | 🖫 Save | 🛏 Request Bed | ❷ Help |

⊗ A bed request for this intake has already been completed, only one bed request per intake.

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

Email

mmmaaa.ca

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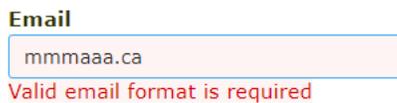
18. Contact Information section. Note that an error message appears if *Date Client Provided Consent* field is blank.

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
friend	Anya Anya	444-444-4444		📅 Consent Date cannot be in the future	Remove Contact

Add Contact