
Client Summary Screen

Updated on October 2023

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Business Purpose:

The Client Management – Summary page displays a basic profile of clients **Personal & Key Information, Current Programs, Family** and **Referrals** in separate sections.

The Personal information includes the Client's Last Name, First Name, Alias, SMIS Client Number, Date of Birth, Gender, Pronoun, Phone, Email and SMIS Status (Active if admitted to a bed/room).

The Key information section shows any Health and Safety Alert(s) regarding the Client (includes message, who entered it, and date entered). Followed by the total # of bed nights since the beginning of SMIS, December of 2009, the total number of bed nights over the past year and the total number of bed nights over the past 3 years.

A Chronic homeless statement and buttons will then be displayed if under the Federal Reaching Home Directives definition of chronic homelessness, the Client has at least one of the following two conditions:

- *a total of at least 6 months (180 days) of homelessness over the past year.*
- *recurrent experiences of homelessness over the past 3 years, with a cumulative duration of at least 18 months (546 days).*

Clicking on the **Chronically homeless** button will open up a window showing the above mentioned Federal definition. And clicking on the [housing assistance](#) link will open up a window to the Subsidized Housing & Housing Benefits website.

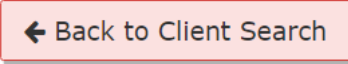
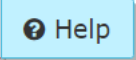
The **Bed/Room** tab displays the **Assigned Room** and the **Assigned Bed** (for non-families).

The **Current Program** tab displays any active bed program admissions including the Admission date, Assigned Bed/Room and any other active service program intakes for the client.

The **Family** tab displays members of family information when applicable.

The **Referrals** tab shows any current active referrals and their status for the client.

How to:

1. There are two buttons in the Client Summary page:  and 
2. The clickable fields on this Summary screen are:
 - a) [Program Names](#) in the **Current Programs** tab - once clicked, the user will be taken to the program's client listing screen.
 - b) [Client IDs](#) in the **Family** tab - once clicked, the user will be taken to the [Client Summary](#) view of family members.
3. There are also other shortcuts on this page which are clickable:
 - a) [View intakes](#) link – once clicked, the user will be taken to the Intake page
 - b) [Create alert](#) link - once clicked, a pop-up window appears. Enter a message, save it or cancel it.

Message: (18/4000 characters)

This is test alert

User Name: Smith, Laura Date:

- c) [View programs history](#) - once clicked, the user will be taken to [Client Management – History](#) screen.
- d) [View all referrals](#) – once clicked, the user will be taken to the [Client Management – Referral](#) view.

Important notes:

1. A **BNL alert** will appear once a new Intake started (consent to participate on the BNL should be signed once). The alert 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 alert will appear after the BNL withdrawal.

[-] BNL Consent Alert. Collapse

Please note that client has "Withdrawn" or "Refused to participate" in the By Name List (BNL). Please continue working with the person to develop a housing plan and assist them to access supports and resources they may be eligible for. Please ensure the person understands that if they are not on the BNL they will not be considered for housing and support programs available through the City's Coordinated Access to Housing and Supports direct matching process.