
To Add or Remove a Family Member

Updated on October 2023

[Home](#) > [Client Management \(Search Client\)](#) > [Intake](#) > [Update](#) > [Family Intake](#)

Business Purpose:

Clients who are not individuals must be intake as a family into SMIS. The Head of the family must be intake first, followed by "adding" the other family members, which are either Dependents or a Spouse/Partner.

Similarly, the same members when they leave the family, must be "removed" from the family using the same Family Intake screen BEFORE he/she is discharged individually.

How to Intake a Family Member:

1. Be sure you are on the Intake screen for the Head of the family.
2. Enter all necessary information in the following sections of the Intake process:
Bed program (ACC: Room): *Notice of collection, Personal Information, Living Situation, Length of Homelessness, Family, BNL Consent (can be signed only after the intake saved), Client Details, Support Needs, Income, Identification and Contact Information.*
Service Program: *Intake Program, Notice of Collection, Personal Information, Living Situation, Length of Homelessness, Central intake Call Details (this section is available only in the Central Intake program), Family, Support Needs*
Whenever available, use the drop-down arrow next to the field for selection.
3. **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 search  button.

Family

Client Id	Last Name	First Name	Gender	DOB	Also Known As	Relationship	Notice of Collection list	By Name	Action
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Personal Information

Last Name	First Name	Gender	DOB	Action
<input type="text" value="Eric"/>	<input type="text" value="Norman"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="Q"/> <input type="button" value="x"/>

b. If this is an existing client, click on the [Add Existing](#) link.

Personal Information

Last Name	First Name	Gender	DOB	Action
<input type="text" value="Gin"/>	<input type="text" value="Anna"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="Q"/> <input type="button" value="Add"/> <input type="button" value="x"/>

Action	Client No	Name	Date of Birth	Gender	Also Known As
Add Existing	729673	Gin, Anna	1996/09/09	Female	Anna

c. If this is a new client, click on the  icon. Then click on the "Save".

d. The error messages will be displayed for the following fields: Gender, Date of Birth, Relationship if information is not entered.

<input type="text" value="0"/>	<input type="text" value="Gin"/>	<input type="text" value="Gin"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="Remove Member"/>
			Client Gin Gin gender field is required.	Client Gin Gin date of birth field is required.			Client Gin Gin relationship field is required.

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

e. Enter all mandatory information and save. The following warning messages should be displayed:

Family									
Client Id	Last Name	First Name	Gender	DOB	Also Known As	Relationship	Notice of Collection	By Name list	Action
729674	Gin	Gin	Male	1995/09/09		Spouse/	Attest	Record	Remove Member
<p>Warning: This family member has not attested NOC. (client name: Gin, Gin)</p> <p>Warning: This family member has not recorded BNL. (client name: Gin, Gin)</p>									

f. You can click on [Attest](#) and [Record](#) buttons.

- Clicking on [Attest](#) button will open a [Confirmation](#) pop-up window.
 - Clicking on [Confirm](#) button will close the pop-up window and NOC status will move to 'Complete'.

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

- Clicking on [Record](#) button will open a [Confirmation](#) pop-up window.
 - Clicking on [Confirm](#) button will close the pop-up window and BNL status will move to 'Active'.

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*

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

Client Id	Last Name	First Name	Gender	DOB	Also Known As	Relationship	Notice of Collection	By Name list	Action
<input type="text" value="729675"/>	<input type="text" value="Gin"/>	<input type="text" value="bob"/>	<input type="text" value="Male"/>	<input type="text" value="2015/09/09"/>	<input type="text"/>	<input type="text" value="Dependi"/>	<input type="text" value="Attest"/>	<input type="text" value="Record"/>	<input type="text" value="Remove Member"/>
<input type="text" value="729674"/>	<input type="text" value="Gin"/>	<input type="text" value="Gin"/>	<input type="text" value="Male"/>	<input type="text" value="1995/09/09"/>	<input type="text"/>	<input type="text" value="Spouse"/>	<input type="text" value="Complete"/>	<input type="text" value="Active"/>	<input type="text" value="Remove Member"/>

Confirm Override for ALL Remaining Warnings and Save

- g. You can click on the **Confirm Override for ALL Remaining Warnings and Save** green button. The Dependand data information will be saved but **Attest** and **Record** buttons will remain active.

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

Family

Warning: This family member has not attested NOC. (client name: Gin, Dora)
Warning: This family member has not recorded BNL. (client name: Gin, Dora)

- h. If a family member is a dependant, clicking on the button will save **Notice of the Collection and By Name list** and change the values to 'Complete' and 'Active'.

Family										
Client Id	Last Name	First Name	Gender	DOB	Also Known As	Relationship	Notice of Collection	By Name list	Action	
<input type="text" value="729675"/>	<input type="text" value="Gin"/>	<input type="text" value="bob"/>	<input type="text" value="Male"/>	<input type="text" value="2015/09/09"/>	<input type="text"/>	<input type="text" value="Depend"/>	<input type="text" value="Complete"/>	<input type="text" value="Active"/>	<input type="button" value="Remove Member"/>	
<input type="text" value="729674"/>	<input type="text" value="Gin"/>	<input type="text" value="Gin"/>	<input type="text" value="Male"/>	<input type="text" value="1995/09/09"/>	<input type="text"/>	<input type="text" value="Spouse"/>	<input type="text" value="Complete"/>	<input type="text" value="Active"/>	<input type="button" value="Remove Member"/>	
<input type="button" value="Add Family Member"/> <input type="button" value="History"/> <input type="button" value="Apply Head of Household's Notice/Consents to Dependents"/>										

- i. To remove a family member, click of the button and then click **Save**.

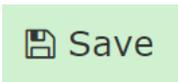
Family										
Client Id	Last Name	First Name	Gender	DOB	Also Known As	Relationship	Notice of Collection	By Name list	Action	
<input type="text" value="729676"/>	<input type="text" value="Gin"/>	<input type="text" value="Dora"/>	<input type="text" value="Female"/>	<input type="text" value="2022/09/09"/>	<input type="text"/>	<input type="text" value="Depend"/>	<input type="text" value="Attest"/>	<input type="text" value="Record"/>	<input type="button" value="Remove Member"/>	
<input type="text" value="729677"/>	<input type="text" value="Gin"/>	<input type="text" value="Jone"/>	<input type="text" value="Male"/>	<input type="text" value="2023/09/09"/>	<input type="text"/>	<input type="text" value="Depend"/>	<input type="text" value="Attest"/>	<input type="text" value="Record"/>	<input type="button" value="Remove Member"/>	
<input type="text" value="729675"/>	<input type="text" value="Gin"/>	<input type="text" value="bob"/>	<input type="text" value="Male"/>	<input type="text" value="2015/09/09"/>	<input type="text"/>	<input type="text" value="Depend"/>	<input type="text" value="Complete"/>	<input type="text" value="Active"/>	<input type="button" value="Remove Member"/>	
<input type="text" value="729674"/>	<input type="text" value="Gin"/>	<input type="text" value="Gin"/>	<input type="text" value="Male"/>	<input type="text" value="1995/09/09"/>	<input type="text"/>	<input type="text" value="Spouse"/>	<input type="text" value="Complete"/>	<input type="text" value="Active"/>	<input type="button" value="Remove Member"/>	
<input type="button" value="Add Family Member"/> <input type="button" value="History"/> <input type="button" value="Apply Head of Household's Notice/Consents to Dependents"/>										

- j. Click on the button. A new pop-up window will display a family history records.

Client Management - Family Intake History							
Family Members							
Last Name	First Name	Date of Birth	Gender	Also Known As	Relationship	Join Date	Left Date
Gin	Gin	1995/09/09	Male		Spouse/Partner	2023/10/03 12:57:08 PM	
Maria	Anna	1996/09/09	Female	Anna	Family Head	2023/10/03 12:57:08 PM	
Gin	bob	2015/09/09	Male		Dependant	2023/10/03 01:24:40 PM	
Gin	Dora	2022/09/09	Female		Dependant	2023/10/03 02:35:23 PM	
Gin	Jone	2023/09/09	Male		Dependant	2023/10/03 03:29:47 PM	

5 items found, displaying all items.

4. Add additional members if needed.



5. Click to save the member(s) record.

Important Notes:

- Family section information should be available in Bed programs (with ACC = Rooms) and Service Programs.
- Adding a family member will create an intake for him/her that will inherit some of the intake field values from the head of the family. If these values need to be changed or other fields filled in, you can update the intake of the new member afterwards.
- If the family has already been admitted, then adding a family member will create both an intake and an admission for him/her. Also, some of the admission field values will be inherited from the head of the family, including the Assign Room* for the family. If these values need to be changed or other fields filled in, you can update the admission of the new member afterwards.
- If selected client member is already in another family and save button is clicked, a message is displayed at the top of the intake screen"

Please note that there are one or more errors on this page. You will not be able to save this page until these errors are corrected.

Family

Error: Client in another family.

At the same time the error message appears in the Family tab:

Family

Client Id	Last Name	First Name	Gender	DOB	Also Known As	Relationship	Notice of Collection	By Name list	Action
729674	Gin	Gin	Male	1995/09/09		Spouse/I			Remove Member

Error: Client in another family.

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

Add Family Member Apply Head of Household's Notice/Consents to Dependents

5. If the user did not click on the search  icon and instead clicked on the [Save](#) button, the following error message will be displayed:

Family

Client Id	Last Name	First Name	Gender	DOB	Also Known As	Relationship	Notice of Collection	By Name list	Action
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Personal Information

Last Name	First Name	Gender	DOB	Action
<input type="text" value="girl"/>	<input type="text" value="gin"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Q"/> <input type="button" value="x"/>

Error: You clicked below, but did not fill out this dependent's details. To resolve this error, please complete one of the following three actions:

- i. Delete this row of information by clicking ;
- ii. Select an existing client to add as a dependent by clicking OR,
- iii. Create a new client by filling in the "Last Name", "First Name", "Gender" and "DOB" fields and clicking . Please only create a new client after you have searched and confirmed that this dependent does not already exist as a client.