SMIS Release Notes Version 4.1.0

The Shelter Management Information System (SMIS) is a web-based information management system used by programs across the city that provide services to individuals and families experiencing homelessness. SMIS is administered by the City's Toronto Shelter & Support Services (TSSS) division. SMIS is primarily used by City-funded shelters, 24-hour respites, and COVID-19 temporary shelter programs to conduct client intake, admission, case management, and discharge. It is also used by service programs (e.g., Streets to Homes, Central Intake).

This set of Release Notes describes the changes that are included in the January 2025 SMIS enhancement, release version 4.1.0. All changes included in this SMIS enhancement were prioritized by the City of Toronto SMIS Steering Committee and Director Group. Combined, these changes address the highest current priority change requests in SMIS.

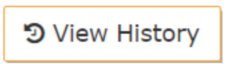
Please note that this document will also be available online at Shelter Management Information System (SMIS) – City of Toronto.

Contents

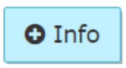
1) Enhancements to the Complaints Module

This change introduces a new UI design of the [Client Management Complaints] page to enhances the users experience in creating a new or updating an existing Complaint record. This module provides a complete workflow for a comprehensive solution to streamline complaint management records.

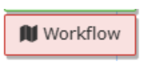
This module includes the following new functions:

1. "**View History**" 

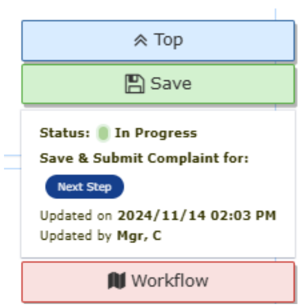
 - When clicked, this button will open a PDF with instructions and explanations on how to use the "Client Management Complaint" page in a new browser tab, allowing the user to print and/or save the PDF.

2. "**Info**" 

 - This icon is available in each section. When clicked, a tab will open with information that will correspond to the section. When clicked again, the information will be collapsed.

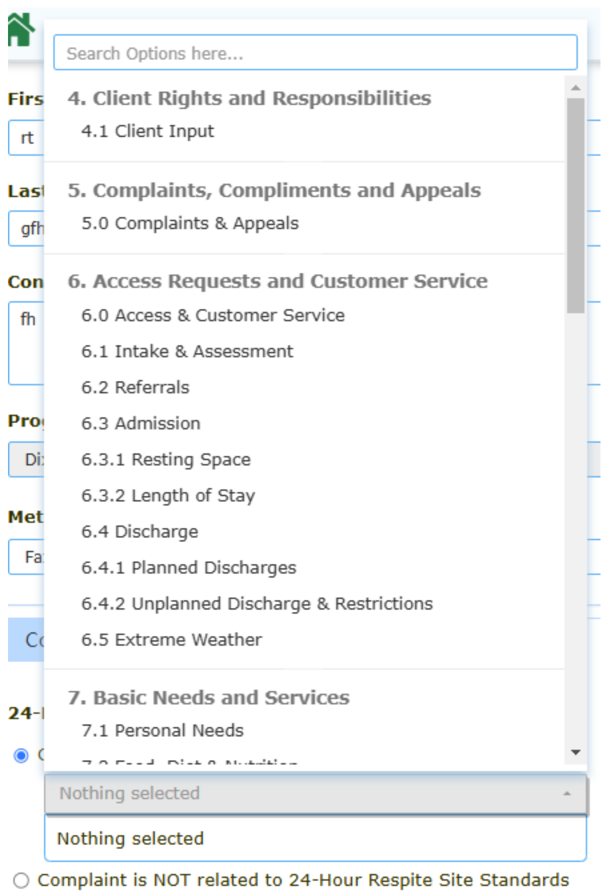
3. "**Workflow**" - 

 - When clicked, a window will open for specific users to view the status of complaint records and easily move them to the next stage.



4. Below are the new **options** added in the Complaint Details section as per the Program's specified Standards setting, either TSS (Toronto Shelter Standards) or TRS (Toronto Respite Standards):

    i. "**Complaint is related to Toronto Shelter Standards**" or "**Complaint is related to 24-Hour Respite Site Standards**" – When clicked, the TSS/TRS drop-down sections appear.



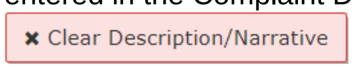
    ii. "**Complaint is NOT related to Toronto Shelter Standards**" or "**Complaint is not related to 24-Hour Respite Site Standards**".

5. "**Investigation**" and **"Outcome**" sections – below are the new functions added to these sections:

    i. After saving a complaint record, a running log generates the following fields to capture the details of all fields, ensuring thorough documentation and traceability:
        1) Name
        2) Date/Time
        3) Description

    ii. "**Update Description/Narrative**" button – Clicking this box opens a free text tab, 'Complaint Description/Narrative' and clicking it again hides the tab.

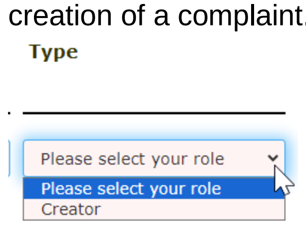
    iii. "**Clear Description/Narrative**" button – Clicking this box clears the text entered in the Complaint Description/Narrative tab.



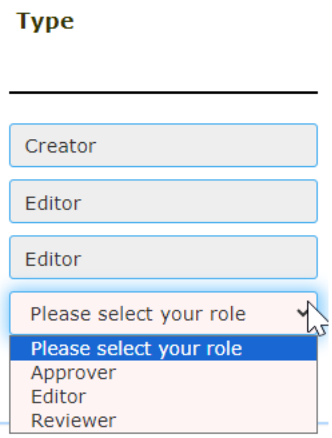
6. Below are the two new **options** added in the Outcome section:

    1) "**The Toronto Shelter Standards were breached**" or "**The 24-Hour Respite Site Standards were breached**" – When clicked, the TSS/TRS drop-down section appears. Users can multi-select all applicable sections.
    2) "**The Toronto Shelter Standards were NOT breached**" or "**The 24-Hour Respite Site Standards were NOT breached**.

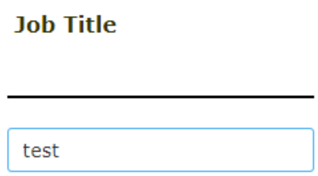
7. "**Creator/Edit/Review/Approval**" section – This section is new. Whenever changes are made or new entries are added to the complaint page, users are prompted to enter additional information in the log tab of the section, ensuring comprehensive and up-to-date records.
    i. Creator/Edit/Review/Approval **Log records**:
        1) **Type** – A field with dropdown options with the following type:
            a) **Creator –** This type is only available only during the initial creation of a complaint.



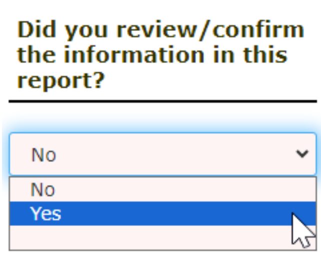
b) **Editor** – This type is available at any time, except at the time of creating a complaint.
c) **Reviewer** – This type is available at any time, except at the time of creating a complaint.
d) **Approver –** This type is only available to the approver at any time, except at the time of creating a complaint. After completing a complaint record, the entire complaint becomes read-only and non-editable.



2) ‘**Job Title’** – Free text field.



3) ‘**Did you review/confirm the information in this report?**’ - A field with dropdown options, ‘Yes’ and ‘No’.



4) ‘**Name**’ and ‘**Date/Time’** fields will be auto-populated by the system each time the ‘Save’ button is clicked.

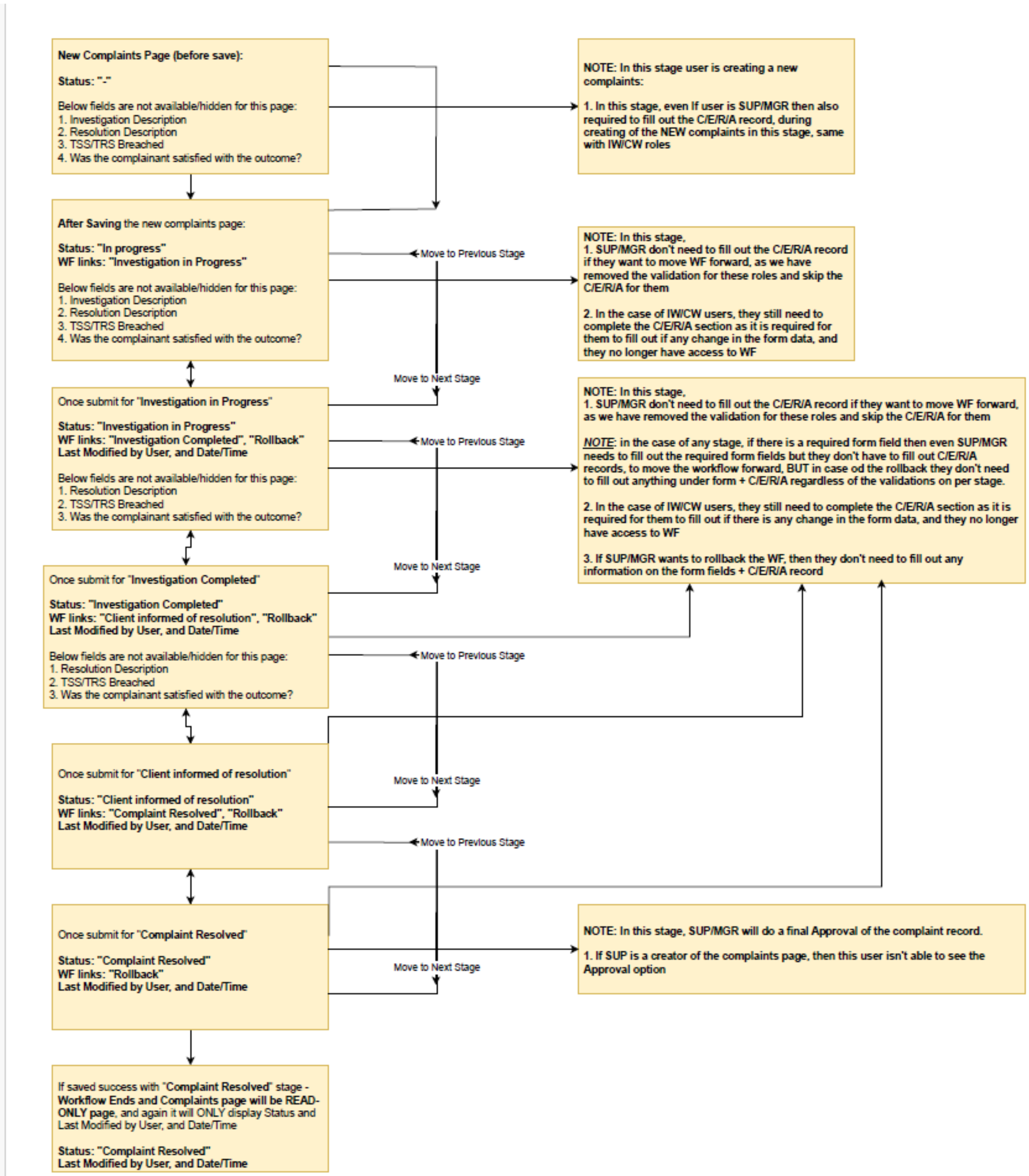
8. **Complaint History Log**” is a newly created page. It displays a record of all changes made to the editable fields in the 'Client Management Complaints' module, including changes made by you or other users at the program.

    a. **‘Complaint History Log’ table** includes several columns: “No”, “Field Name”, “Old Value”, “New Value”, “Date of Change”, “Changed by User”. All column headers are **clickable** and **sort** in ascending and descending order depending on the column header.

No	Field Name	Old Value	New Value	Date Of Change	Changed By User
1.	24-Hour Respite Site Standards Breached		6,11,16	2024/04/04 04:30:28 PM	LauraT, S
2.	Client Number		27121	2024/04/04 04:30:28 PM	LauraT, S

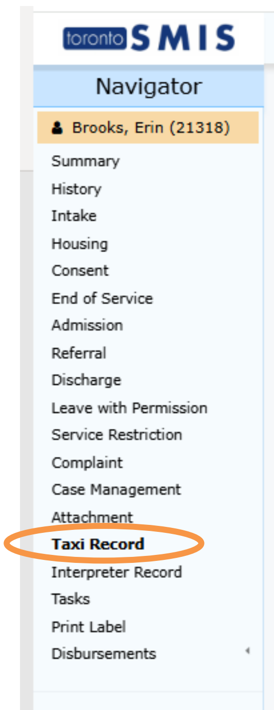
9. “**Complaint Workflow**”

Below is a workflow of the Complaint record:

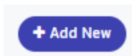


2) New CI Taxi Record Module

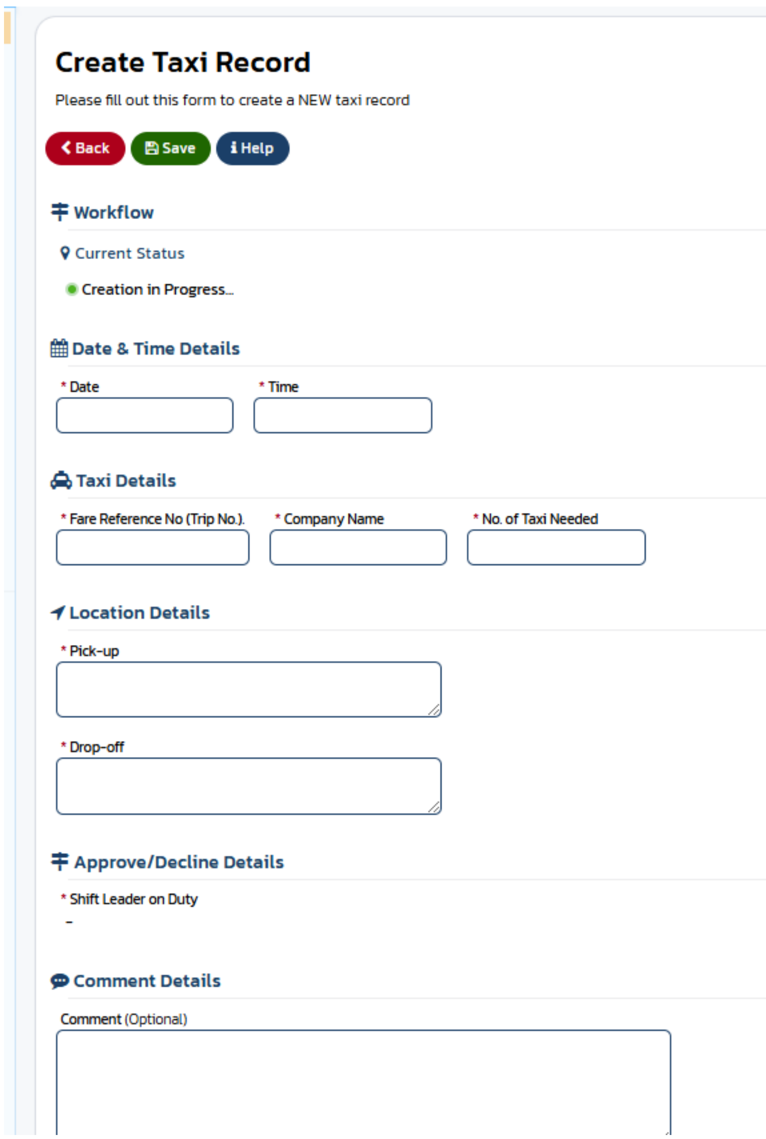
This new module provides a comprehensive solution for capturing and managing all taxi-related records for clients. Users must have permission rights to access the Taxi Record module.



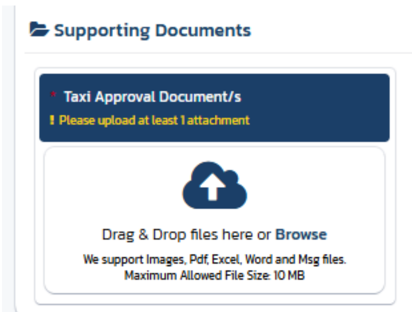
This module includes the following key functions:

1. "**Add New**" 

- When clicked, this button will direct user to the *Create Taxi Record* page and will be able to enter all necessary fields to save the Taxi Record.



2. **“File Attachment Support”** - This section allows the user to attach relevant files to each taxi record for better organization and accessibility. A file attachment is a mandatory to save the taxi record.



3. “**Save**” Save - When clicked, this button will save the taxi record and will have a status of “*Record in Progress*”.

4. “**Edit Existing Taxi Records**” - When clicked, this button will open the Edit Taxi Record page where users can update and modify existing records to keep information current and precise.

5. **“Submitted for Approval”** Submitted for Approval **-** After creating a taxi record, user can submit for approval to ensure compliance and accuracy. When this button is clicked, the taxi record status will be “*Submitted for Approval*”.

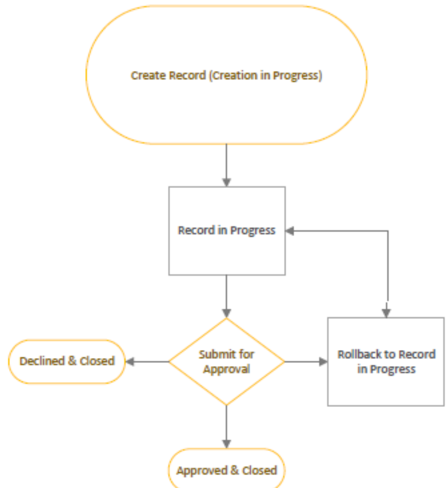
6. “**Approved & Closed**” and “**Declined & Closed**” Approved & Closed Declined & Closed - After submitting for approval, Approvers can review records and can either approve or decline. When these buttons are clicked, the taxi record status will be changed to either “*Approved & Closed*” or “*Declined & Closed*”.

7. **Read-Only mode –** After approving or declining the taxi record, it becomes read-only and non-editable to all users, ensuring the integrity and finality of the record.

8. “**Rollback**” Rollback - When clicked, the status of taxi records will be reverted to its original status “*Record in Progress*” if needed, allowing for users the flexibility for error correction.

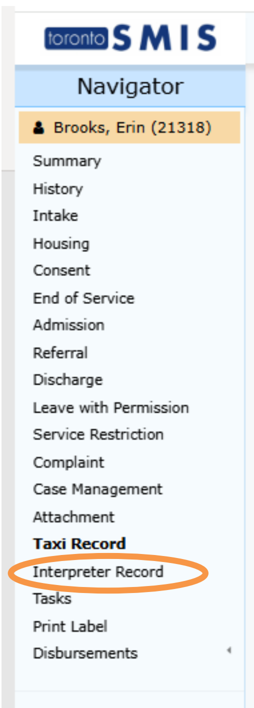
9. “**Excel Download**” Excel - When clicked, an excel file downloads to the local device which contains the Taxi Records for easy view and data analysis in a spreadsheet.

10. “**Workflow**” of the Taxi record:

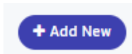


3) New CI Interpreter Module

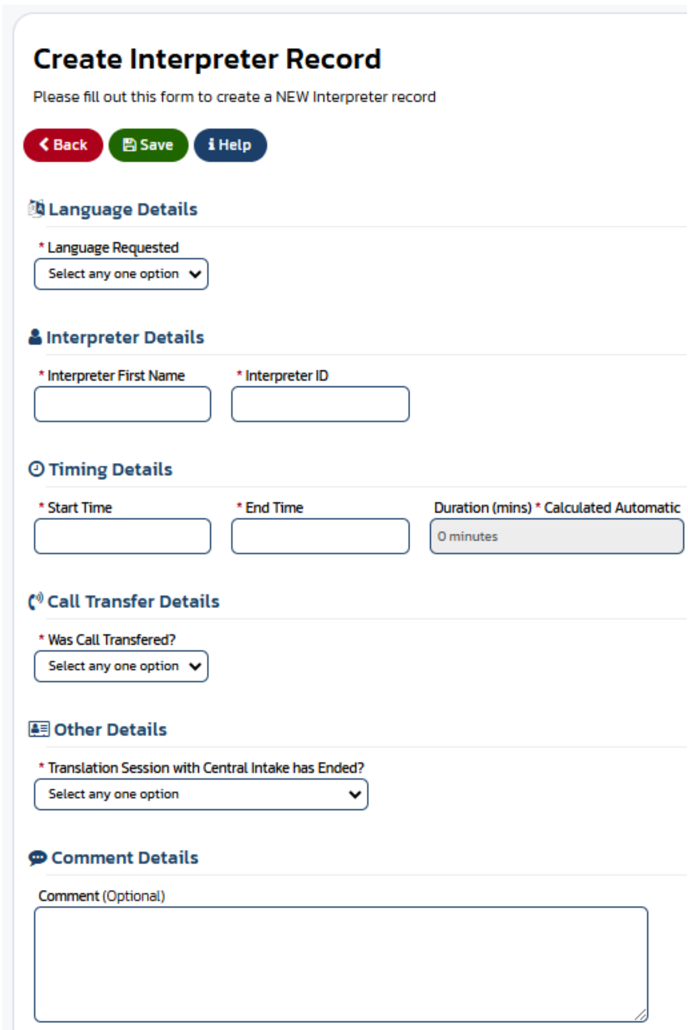
This new module provides a comprehensive solution for capturing and managing all interpreter-related records for clients. Users must have permission rights to access the Interpreter Record module.



This module includes the following key functions:

1. "**Add New**" 

- When clicked, this button will direct the user to the *Create Interpreter Record* page and will be able to enter all necessary fields to save the Interpreter record.



Create Interpreter Record

Please fill out this form to create a NEW Interpreter record

Back | Save | Help

Language Details

* Language Requested
Select any one option

Interpreter Details

* Interpreter First Name
* Interpreter ID

Timing Details

* Start Time
* End Time
Duration (mins) * Calculated Automatic
0 minutes

Call Transfer Details

* Was Call Transfered?
Select any one option

Other Details

* Translation Session with Central Intake has Ended?
Select any one option

Comment Details

Comment (Optional)

2. "**Save**" 

- When clicked, this button will save the Interpreter record.

3. "**Excel Download**" 

- When clicked, an excel file downloads to the local device which contains Interpreter Records for easy view and data analysis in a spreadsheet.