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## Client Complaint (Edit) Screen


Updated in March 2026

[Home](#) > [Client Management \(Search Client\)](#) > [Complaint](#) > [New Complaint/Update](#)

### Business Purpose:

The **Client Management – Complaints Record** page allows the user to create a new or update an existing incomplete Complaint record.

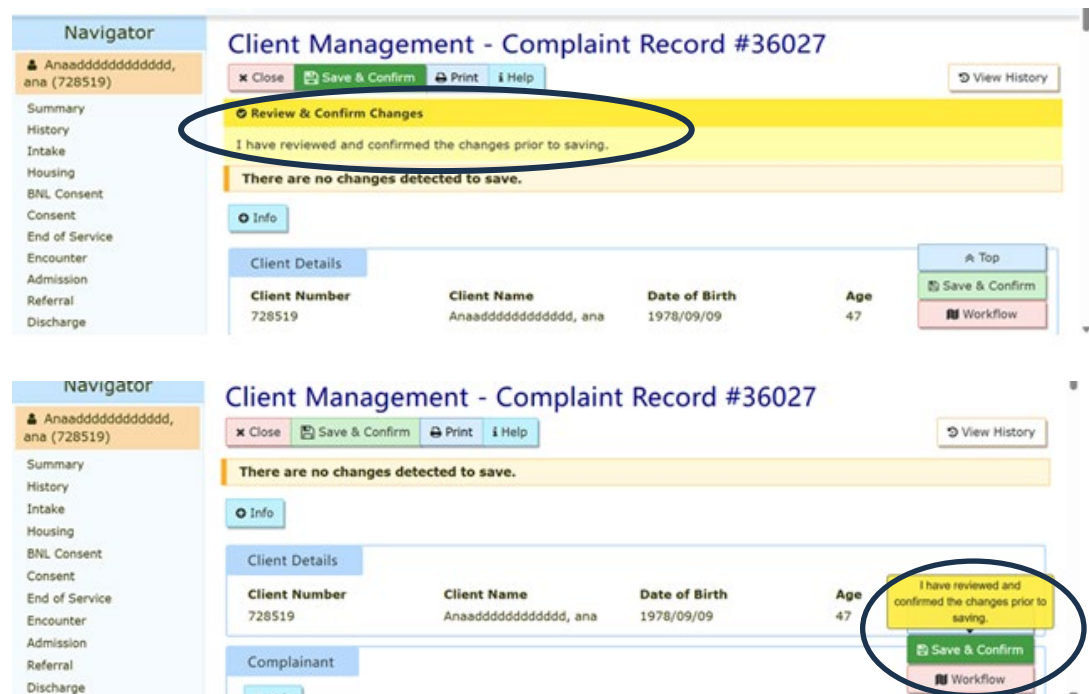
### How to:

- i. 'Client Management – Complaint List' page:
  - 1) To create a new complaint record, click the  action button.
  - 2) To update/view an existing Complaint, from the Client Management – Complaint (list) page, click on the '[Complaint ID](#)'.
- ii. Clicking on the '[New Complaint](#)' button – will take the user to a new '**Client Management - Complaint Record New**' tab.
  - 1) '[Complainant](#)' section, where a user can select and fill out the following mandatory fields:
    - [Source](#)\* - if '[Client](#)' option is selected from drop-down menu the following next fields will be hidden: [First Name](#)\*, [Last Name](#)\*, [Contact Information](#)\*.
    - [First Name](#)\* (if enabled) – a free text field where the user can enter client's first name.
    - [Last Name](#)\* (if enabled) – a free text field where the user can enter client's last name.
    - [Contact Information](#)\* (if enabled) – the user can enter additional client information.
    - [Program](#)\* - a single select drop-down menu of all Programs from the Client History list.
    - [Method of Contact](#)\* - a drop-down menu where the user can select one method of communication.
  - 2) '[Complaint Description/Narrative](#)' section.
    - a free text tab named '[Complaint Description/Narrative](#)\*', where the initial complaint from the client/representative is documented.
    - Once saved, it can no longer be edited, and it is read-only.
  - 3) '[Save & Confirm](#)' button - opens an '[Important Message](#)' pop-up window

with two options to select:

- 'Cancel' button – saves the complaint record.
- 'Okay' button - saves the complaint record with all information entered.
- Once the complaint is saved a complaint ID number is created and complaint status moves to 'In Progress'.
- The save popup is for SUP and MGR roles to ensure they continue to receive confirmation prompts aligned with their workflow responsibilities.

4) A prompt confirmation message will be displayed to ensure users review all information before saving or updating a complaint record. When hovering over the Save & Confirm button, the system now displays a review-confirmation message. When users click Save & Confirm, it indicates that they acknowledge and accept the changes they have made to the complaint record.



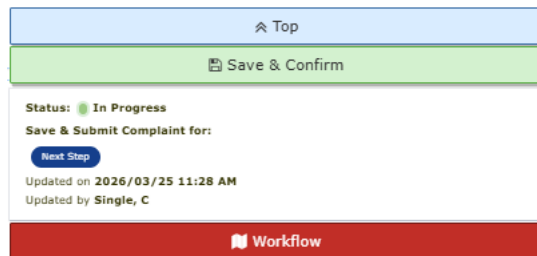
iii. 'Complaint ID' link - takes the user to the 'Client Management - Complaint Record' tab.

1) 'Complaint Details' section:

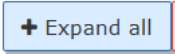
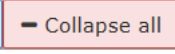
- There are two options to select under TSS/24-Hour TRS:
  - a) **Toronto Shelter Standards\***:
    - *Complaint is related to Toronto Shelter Standards* – a

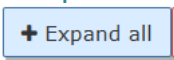

- radio button with a TSS drop-down menu and a searchable bar option.
  - *Complaint is NOT related to Toronto Shelter Standards* – a radio button option when a complaint is not related to TSS.
- b) **24-Hour Respite Site Standards\***:
  - *Complaint is related to 24-Hour Respite Site Standards* - a radio button with a 24-Hour TRS drop-down menu and a searchable bar option.
  - *Complaint is NOT related to 24-Hour Respite Site Standards* - a radio button option when a complaint is not related to 24-Hour TRS.
- Once TSS/24-Hour TRS is selected and saved the complaint status still stays *'In Progress'*.

2) Clicking on the floating **'Workflow'** window will either expand/collapse:



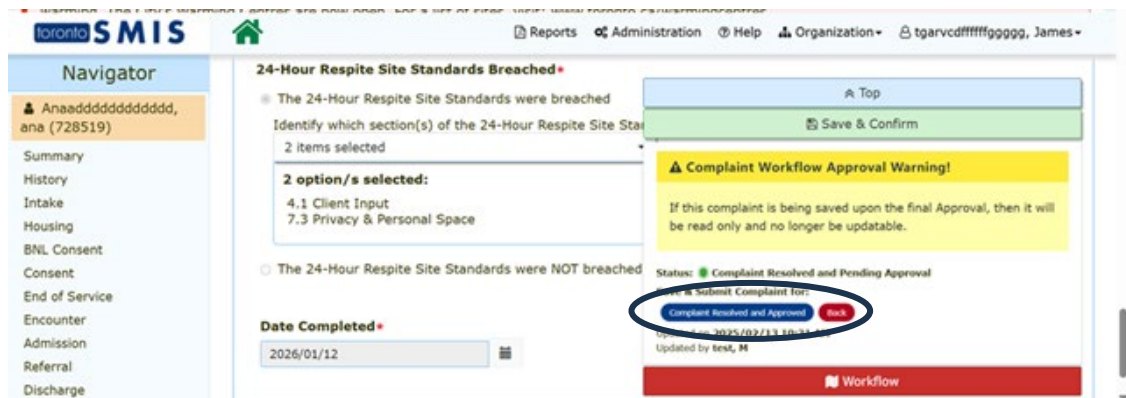
- **'Top'** button - moves the user to the top of the complaint page.
  - **'Save & Confirm'** button - opens an *'Important Message'* pop-up window with two options to select:
    - **'Cancel'** button – not saves the complaint changes.
    - **'Okay'** button - saves the complaint record with all information entered.
  - **'Next Step'** button – moves the complaint status to next stage *'Investigation in Progress.'*
    - **'Back'** button – returns the user to the previous complaint stage.
- 3) **'Investigation'** section.
- **'Description Investigation Activities\*'** tab – a free text tab, where the progress of the investigation can be described in detail.
    - Once the text saved and the complaint is moved to next stage, this field can no longer be edited.
  - **'Update Investigation Activities'** button – hides and opens the *'Description Investigation Activities\*'* tab.

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- 'Clear Investigation Activities' button – clears text in the 'Description Investigation Activities\*' tab.
  - Clicking the  button expands the investigation log records once saved.
  - Clicking the  button collapses the investigation log records once saved.
- 4) Clicking on the 'Next Step' button will move the complaint status to next stage 'Investigation Completed.'
  - 5) Clicking on the 'Back' button – returns the user to the previous complaint stage screen.
  - 6) Clicking on the 'Next Step' button again will move the complaint status to next stage 'Client Informed of Resolution.'
  - 7) 'Outcome' section:
    - 'Description of Complaint Resolution\*' tab – a free text tab, where a detailed description of the complaint resolution documented.
      - Once text is saved and the complaint is moved to next stage, this field can no longer be edited.
    - 'Was the complainant satisfied with the outcome? \*' – a drop-down menu with multiple selections.
    - There are two options to select under TSS/TRS breached:
      - a) 'Toronto Shelter Standards Breached':
        - 'The Toronto Shelter Standards were breached' – a radio button to select with a TSS breached drop-down menu with a searchable bar option.
        - 'The Toronto Shelter Standards were NOT breached' - a radio button option to select when a complaint is not related to TSS breached.

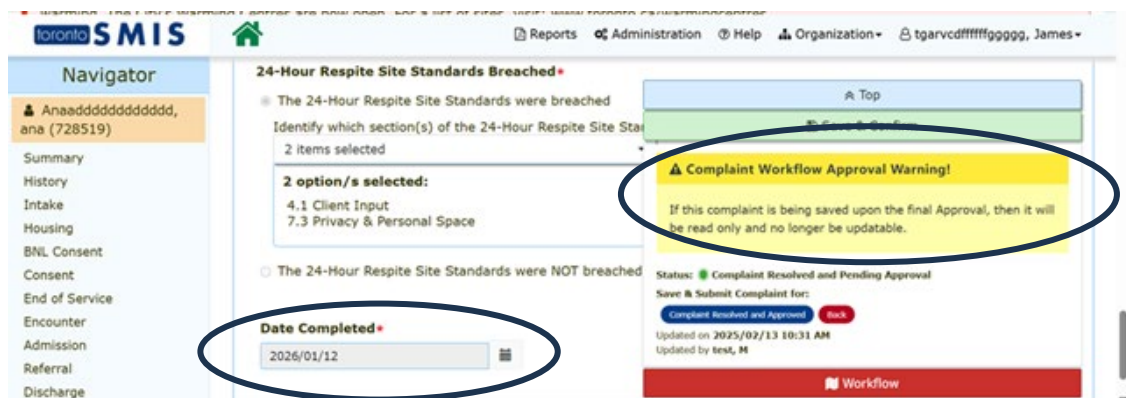
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- b) '24-Hour Respite Site Standards Breached':
- 'The 24-Hour Respite Site Standards were breached' - a radio button to select with a TRS breached drop-down menu with a searchable bar option.
  - 'The 24-Hour Respite Site Standards were NOT breached' - a radio button option to select when a complaint is not related to TRS breached.
- 'Update Complaint Resolution' button – hides and opens the 'Description of Complaint Resolution\*' tab.
  - 'Clear Complaint Resolution' button – clears a text in the 'Description of Complaint Resolution\*' tab.
  - Clicking on the  button will expand the outcome log records once saved.
  - Clicking on the  button will collapse the outcome log records once saved.
- 8) Clicking on the floating 'Workflow' window will either expand/collapse it:
- Clicking on the 'Complaint Resolved and Pending Approval' button will open an 'Important Message' pop-up window:
    - Clicking on the 'Toronto shelter Standards' button will open a 'Toronto Shelter Standards' pdf.
    - Clicking on the '24-Hour Respite Site Standards' button will open a '24-Hour Respite Site standards' pdf.

- Clicking on the 'Okay' button will save the complaint record with all information entered and will move the complaint status to the next stage 'Complaint Resolved and Pending Approval'.

9) "Complaint Resolved and Approved Button in Workflow Floating Button" will be displayed in the workflow floating button. This allows users to mark a complaint as resolved and approved directly within the workflow.



10) A warning message is now displayed during the final approval save. The message informs users that the complaint is being saved as part of the final approval, after which the record will become read-only and can no longer be updatable. When hovering over the Complaint Resolved and Approved button, the system will display the Date Complete field, allowing users to see when complaint was finalized.



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### Important Notes:

- 1) Clicking on the '**Close**' button will close the complaint record.
- 2) Clicking on the '**Print**' button will open a detailed description of the complaint in pdf format.
- 3) Clicking on the '**Help**' button will redirect the user to an offline webpage where a PDF document with description of a complaint help guide will open.
- 4) Clicking on the '**View History**' button will redirect the user to the '**Complaint History Log**' screen.
- 5) Clicking on the '**Workflow**' window will not be enabled for all staff but only for the staff with higher roles permissions.
- 6) Clicking on the '**Info**' button will expand and collapse the information box.