By-Name List Scorecard (BNL Scorecard) Guide

What is the BNL Scorecard Guide?

This Guide explains what the BNL Scorecard is, makes suggestions for how to use it, and walks you through the 10 BNL Scorecard questions and next steps to achieve a quality By-Name List. For each of the 10 questions (in black font), further information is provided on how to interpret and score the questions (in red font), tips for moving forward (in blue font), and tips for HIFIS 4 (in green font).

This Guide is not the BNL Scorecard itself. The on-line BNL Scorecard and further information about By-Name Lists, including the 10 Steps to Create and Use A By-Name List can be found on the By-Name List Resources page on the 20,000 Homes Campaign website at www.20KHomes.ca.

What is the BNL Scorecard?

The BNL Scorecard is a 10-question self-assessment tool to assist your community to take a snapshot of your local progress towards a quality By-Name List[1] and identify areas for improvement. Community Solutions brought together leading communities, federal partners, and national experts to create a shared quality standard against which you can measure your local system. This scorecard was then reviewed and adapted for the 20,000 Homes Campaign in Canada.

Read our thoughts below on how to use this tool before proceeding to the BNL Scorecard questions section in this Guide. Remember, 20KHomes Campaign communities are asked to complete the on-line BNL Scorecard every quarter until they achieve a 10/10.

How to Use the BNL Scorecard

Invite the right people to the room. It is helpful to complete the BNL Scorecard with the full group of local stakeholders working to end homelessness, rather than having one or two people complete the scorecard alone. When people complete the scorecard as a group, they clarify polices and identify service strengths and gaps (or perception of gaps). See the BNL Scorecard Worksheet and sample exercises (to use with larger groups) to facilitate discussion and

[1] With a focus on chronic individuals (adults and youth) to align with the 20KHomes Campaign goal to end chronic homelessness in 20 communities across Canada by July 1, 2020.

document progress in completing the scorecard. Note that if you are a 20KHomes Reporting Hero, your on-line scorecard answers can be found in your Performance Management Tracker.

What Your Score Means

Your score is a baseline, not a judgement. It should help you create action plans and measure improvement towards a quality By-Name List. This tool is for your benefit and is not required by any funder or government.

A Quality By-Name List

The minimum threshold for a quality By-Name List is measured by a score of 10/10 on the BNL Scorecard and three months of reliable data. We believe this score demonstrates that your By-Name List can be used to track progress toward ending chronic homelessness[2] in an accurate and meaningful way.

When Scoring Less Than 10

Don't worry, many communities are in this boat. It's all about using this data for improvement! After your community takes the BNL Scorecard, you can begin exploring areas for improvement as indicated by your score analysis. After you implement successful changes, take the scorecard again to measure your progress.

20KHomes communities continue to take the BNL Scorecard each quarter until they reach a 10/10. If you would like to discuss the BNL Scorecard or your next steps, please contact marie@caeh.ca.

When Scoring 10/10

Congratulations! 20KHomes communities who have submitted their on-line BNL Scorecard with a score of 10/10 will receive communication from the 20KHomes Team regarding the next steps to confirm your score and your data reliability to be recognized as achieving quality By-Name List.

To confirm your 10/10 score:

- Your community must have submitted at least one month of complete By-Name List measures data through the 20KHomes monthly data report.

[2] See the 20KHomes Functional Zero Chronic Homelessness Q&A document for definitions and further information related to functional zero chronic homelessness.

- You must complete and submit the BNL Scorecard Worksheet to marie@caeh.ca to describe how your community meets each of the 10 scorecard elements. Your description doesn't need to be extensive (see a sample completed worksheet here). If preferred, we can discuss and complete the worksheet together over the phone. By completing the worksheet, we can confirm consistent interpretation of the scorecard elements and collect your best practices to share with others.
- Note that meeting the minimum BNL Scorecard quality threshold of 10/10 does not mean your list is perfect! Keep challenging yourself to sustain and improve it.

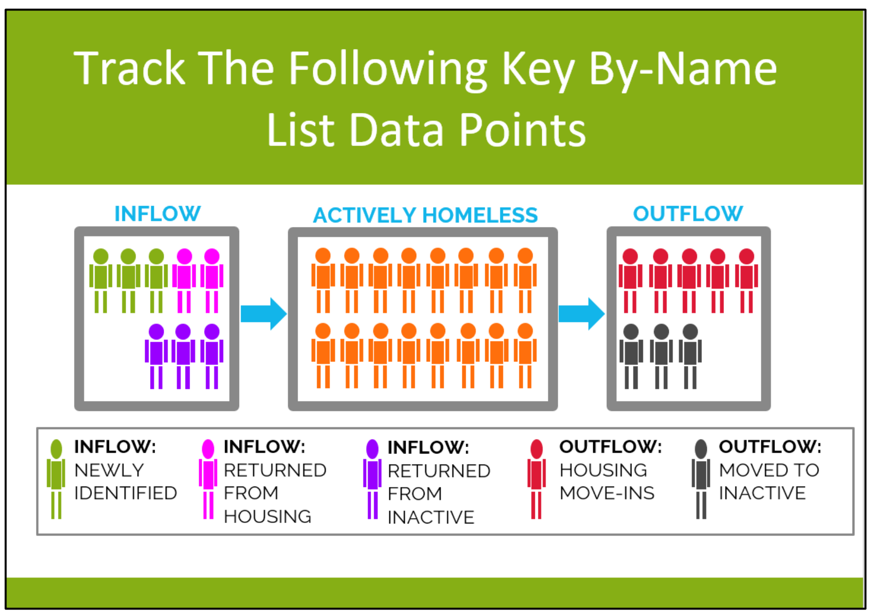
To confirm your quality By-Name List:

- You have been confirmed as having a 10/10 on the BNL Scorecard (see above).
- You have submitted three consecutive months of balanced By-Name List measures data (see further description below).

Right off the bat, if you have reported data to 20KHomes for three consecutive months or more on your inflow, outflow and actively homeless numbers, you can start using your Performance Management Tracker to analyze your By-Name List data and project when your community will reach functional zero on chronic homelessness.

By-Name List Data Points and Balanced Data

The quality of your By-Name List is not only measured by receiving an 10/10 on the scorecard, but also by the quality of the data that your community's BNL produces (based on the six key BNL data points - inflow, outflow and actively homeless).



Without accurate and reliable data your community cannot:

- Understand where you are relative to the goal of ending homelessness
- Make projections or set meaningful reduction goals
- Accurately measure progress and performance
- Get to functional zero on chronic homelessness AND stay there

You can tell if your community has reliable, balanced BNL aggregate data if the change in your actively homeless number from one month to the next is the same as the difference between your inflow and outflow (see below):

 # CURRENT ACTIVELY HOMELESSNESS = # PREVIOUSLY KNOWN ACTIVELY HOMELESSNESS + INFLOW − OUTFLOW

	ACTIVELY HOMELESS	NEWLY IDENTIFIED	RETURNED TO ACTIVE FROM HOUSING	RETURNED TO ACTIVE FROM INACTIVE	HOUSING MOVE-INS	MOVED TO INACTIVE	NET MONTHLY CHANGE	BALANCE CHECK
January 2016	200	30	3	1	35	5	-6	Yes
December 2015	206	32	1	0	30	1	2	Yes

$$200 = 206 + \underbrace{(\,30 + 3 + 1\,)}_{\substack{\textbf{34}\\ \text{MONTHLY}\\ \text{INFLOW}}} - \underbrace{(\,35 + 5\,)}_{\substack{\textbf{40}\\ \text{MONTHLY}\\ \text{OUTFLOW}}} = -6$$

The ability of your By-Name List to produce accurate data is just as important as having a 10/10 on the scorecard. Before your community feels confident in your By-Name List, you should review the six By-Name List measures identified above, month over month to check your data accuracy.

Your data is considered balanced when you meet the threshold of 15% margin of error in the change in your actively homeless number and comparing that to the change in your (inflow-outflow) over the course of three consecutive months. For 20KHomes communities, you can easily see both your monthly and three-month data reliability in the “BNL Engine” tab of your Performance Management Tracker as soon as you report your monthly data. We think a three-month lookback is a great way to get a handle on how reliable your data is overall. We think a monthly snapshot of your data reliability is a great way to flag if something is up with a specific month and catch reporting errors plus to track improvements in data quality over time.

By-Name List Scorecard Contact Information and Context Questions

(These questions are for contact information and context only and are not scored – they are included at the beginning and end of the BNL Scorecard)

Which community are you representing? The on-line BNL Scorecard will have a drop-down of participating 20KHomes Communities. Only communities participating in 20KHomes will be able to complete the on-line BNL Scorecard.

* Your name:
* Your email address:
* What is the lead agency or entity that is responsible for your community's By-Name List?

Meaning, the person or agency that is officially responsible for consistently updating the By-Name List as part of their job.

What geographic area does the By-Name List you are scoring cover? Open-ended – identify what area your By-Name List covers (e.g., Region, County, City, Town etc.)

What population group(s) does the By-Name List you are scoring cover? Check all that apply.

Chronicity	Acuity	Population Groups
❑ All chronic Individuals (adults and youth) ❑ Episodic ❑ Transitional (one-time)	❑ High acuity ❑ Medium acuity ❑ Low acuity	❑ Single Adults ❑ Youth ❑ Families ❑Other ________________

A Quality By-Name List ideally includes <u>all</u> people experiencing homelessness in your jurisdiction. However, you may not be positioned to begin your By-Name List journey with a list that includes everyone experiencing homelessness. You may begin with a subset of the homeless population as a first step or interim approach to building a complete By-Name List of all people experiencing homelessness.

Which tools is your community using? Check all that apply

By-Name List Data Platform	Common Assessment Tool	
	Screening Tools	Full Assessment Tools
❑ HIFIS 3 ❑ HIFIS 4 ❑ Excel ❑ Access ❑ Other__________	❑ VI-SPDAT – Adult Individuals ❑ VI-SPDAT – Youth ❑ VI-SPDAT - Family ❑ VI-SPDAT - Corrections ❑ Other ______________	❑ Full SPDAT – Adults Individuals ❑ Full SPDAT – Youth ❑ Full SPDAT - Family ❑ VAT ❑ YAP (youth) ❑ Other ______________

By-Name List Scorecard Questions

(With Questions in black font, Scoring Information in red font,
Tips for moving forward in blue font, and Tips for HIFIS 4 in green font)

List all known individuals

1. Does your By-Name List include all known individuals experiencing homelessness[3] for which you list covers, including:

   ❑ Unsheltered individuals living in a place not meant for human habitation e.g., street, cars, abandoned buildings, campsites etc.

   ❑ Individuals in shelters, safe havens, seasonal or overflow beds, or hotel paid for by a service provider.

   ❑ Individuals in transitional housing (where there is a clear service end-date and if other housing is not found, the person could be discharged to homelessness). Please note, the community should continue to include them on the By-Name List until they are permanently housed.

   ❑ Individuals on your list who are entering an institution, e.g., jail or hospital, where they will remain for 90 days or fewer; if stay exceeds 90 days, you may change their status to inactive.

   ❑ Individuals experiencing hidden homelessness (those living temporarily with others but without guarantee of continued residence or immediate prospects for accessing permanent housing).

❖ALL BOXES CHECKED = CREDIT TOWARD QUALITY
Your community can be confident that your By-Name List is comprehensive when it includes all the categories listed above. Selecting all categories above means that our community has taken sufficient measures to ensure that every known individual is accounted for, whether or not they have been assessed. This step enables you to use the list to navigate towards functional zero chronic homelessness.

TIPS: Question #1 asks you to establish pathways to receive data about each of these locations. It does not require you to have complete, comprehensive coverage of the locations! Other questions will measure coverage. Your initial goal is "some but not all" people from each location.

- Create a list with two columns. In the first column, list agencies contributing data to your By-Name List. In the second column, indicate the types of locations (listed above in checkmark boxes) that each agency reaches.
  - If your list accounts for each category in question 1, stop here! You can check all the boxes and answer "yes" to this question.

[3] Homeless for the purposes of 20KHomes aligns with the Canadian Definition of Homelessness.

    - If your list leaves some categories unchecked, continue.

- Make a plan to strategically engage partners who will cover the locations you need and contribute data to your list.
    - For unsheltered people, consider agencies who do outreach.
    - For shelters, if the shelter cannot contribute data immediately, consider an agency with whom you're already working that can perform in-reach at the shelter.

HIFIS 4 TIPS:

- HIFIS 4 keeps a full list of everyone who has consented for you to put their information into HIFIS, but a list of everyone in HIFIS is not the same as a list of all known individuals!
- HIFIS includes: people who consented to receive services but disappeared before you could assist them; people who stayed in shelters 5 years ago then went to a different city; people who you housed three years ago and are stably housed; people who went to the drop-in centre a few times but who are actually housed; and more.
    - Make sure your data about these individuals is accurate and up-to-date, so that HIFIS can distinguish between clients who are housed and clients who are homeless.
- HIFIS doesn't include people who haven't consented for you to collect their personal information.
    - Make sure you write a policy covering what you do in your community to handle known individuals that have not consented to be entered into HIFIS.

<u>Implement an inactivity policy</u>

2. Has your community established a written policy that specifies the number of days of inactivity at which a person's status will be changed to "inactive" and you are implementing a protocol to locate the individual before they are moved to an inactive status?
   ❑ Yes ❑ No

❖YES = CREDIT TOWARD QUALITY
There are times when people experiencing homelessness on your By-Name List cannot be located. Instead of removing them from the By-Name List, establish an inactive threshold, such that after a defined period of time without contact, a person's status is changed and they are moved to an "inactive" portion of the list or database. This status allows you to easily move "inactive" people back to the "active" part of your By-Name List if they connect with the

homelessness system again but does not skew the number of people actively experiencing homelessness or divert outreach and engagement activities.

TIPS:

- First, create a method to flag people as inactive. The ideal case is that you build a status field into your By-Name List and "inactive" is an option in the field. You may also create a separate list or tab titled "Inactive" and move people to it, although this solution will require a de-duplication process and more manual intervention to maintain.
- Next write a policy (see Inactivity Policy – Key Considerations and Examples). Most communities opt to change a person's status to inactive once there has been no contact for 60 or 90 days. You may challenge your system to tighten by selecting a lower number. An accepted custom is not enough—the policy must be written and adopted by your community (engaging the appropriate governing body or bodies)!
- Gear your system to work with as much automation as possible. Once someone has had no contact with services for 60 or 90 days, can your list automatically mark them as "inactive"? Note, that you can customize this parameter in HIFIS 3.

Finally, create a protocol to attempt to locate the person before they time into inactive status. Outreach workers may look for them at the last-known location, or a case manager may use contact information to reach out.

HIFIS 4 TIPS:

- In the future, HIFIS 4 may include a feature that allows you to automatically inactivate clients who haven't been seen or heard from in a given period of time.
- For now, you can manually mark clients as Inactive on the Client Vitals screen.

Track status changes

3. Does your By-Name List track the 'homeless status' of all people experiencing homelessness on your list, including the date each status was changed? Homeless status fields typically include unsheltered, sheltered, provisionally accommodated, permanently housed, and inactive.

   ❑ Yes ❑ No

❖ YES = CREDIT TOWARD QUALITY
A By-Name List should reflect real-time status updates to client data, including the date of every important event or status change in a person's journey through the coordinated access system. Without this tracking, it is difficult to assess the performance of your coordinated access system. That said, for maximum efficiency, track on the events that lead to a permanent

end to homelessness, which is to say housing; avoid tracking extraneous data that is unrelated to housing clients.

TIPS: Note this question's two equally important requirements: (1) a status field, and (2) the ability to date-stamp each change in status.

If your By-Name List pulls data from an HMIS (e.g., HIFIS):

- You likely already have a status field. Ensure that the proper field is included in your By-Name List template and data pull. Also ensure that the status field is populated with all the necessary options; you may refer to our status list in question #3.
- HIFIS automatically date-stamps status changes. If you are not using HIFIS, ask your HMIS wiz to discern if your software is already date-stamping changes to an individual's status. Typically, there is a log of changes to an individual's record. You may need to contact your HMIS vendor for help in accessing this information.

If your By-Name List is self-contained inside other software, such as Excel:

- Ensure that everyone's record includes a status field.
- Task your data wiz with finding an automated way to track the dates at which a person's status is changed through the system. This information should be collected in as automated a way as possible for system sustainability.
- If you cannot automate date-stamping in your setup, you may create a series of date fields that allow you to time a person's journey through the system, e.g. "Date assessed," "Date into shelter," "Date permanently housed," "Date moved to inactive," etc. This method is less elegant and requires more manual intervention, so use it only as a last-ditch effort.

HIFIS 4 TIPS:

- A client's homelessness status would be drawn from the Admissions and Housing History modules.
- If the client is staying in a shelter or transitional housing right now, then HIFIS can tell that they're homeless because they have a current stay (a stay with no end date) in the Admissions module.
- If the client is currently unsheltered, provisionally accommodated, or permanently housed, HIFIS can tell by looking at the client's Housing History and checking for a current housing record (one with no end date).
- If you work with a client to find them housing using the Housing Placements module, HIFIS automatically adds that to the client's Housing History. In other words, if you're using the Housing Placement module, you don't need to double-enter this data.
- If a client is inactive, that's stored differently because it doesn't directly relate to their housing. You can manually mark clients as Inactive on the Client Vitals screen.

Coordinate outreach coverage

4. How much of your community's geographic area is covered by a documented and coordinated outreach system?
   ❑ 100% of the community is covered
   ❑ 90% or more is covered
   ❑ 75%-89% is covered
   ❑ 50%-74% is covered
   ❑ 25%-49% is covered
   ❑ Less than 25% is covered

❖ 75%-100% of the community is covered = CREDIT TOWARD QUALITY
In order to truly end homelessness, your community must ensure that you are not only conducting outreach throughout your entire geography but that the outreach is coordinated and documented. To ensure complete coverage and avoid unnecessary duplication, outreach teams should coordinate to understand where and when each other is working. Documentation of your coordinated outreach may include a wall map, written schedule, or other proof of a coordinated outreach structure.

The regularity of outreach and street engagement should reflect the unique nature of your geography, meaning that outreach may be more frequent in "hot spots" with high concentration of individuals experiencing homelessness and less intense in, for example, rural or mountainous regions. The regularity of outreach and street engagement may also be reflective of your resources (work with what you have and get to areas as often as possible – it needs to happen frequently enough that you are confident in your data).

TIPS:

If you do not currently have a specific outreach program or outreach workers in your community, consider organizing other workers in the community to conduct mini outreach blitzes as often as they can (e.g., once or twice a month).

Determine coverage area:

- Get a large map of your community; a paper map on the wall is great, and projecting Google Maps on a screen can work too.
- Convene your outreach providers and, together, mark the parts of the map where they regularly do outreach.
- If 75% or more of the map is covered, move onto coordinating and documenting.
- If less than 75% of the map appears covered, discuss the uncovered portions. Why are they not being covered? Write down the main 1-3 reasons and look to solve them by coordinating your coverage.

Coordinate and document coverage:

- While the outreach providers are convened, construct a written schedule of when and where they do outreach:
    - On the map, mark hot spots and ensure that they are covered more frequently.
    - On the map, mark places where people experiencing homelessness are rarely found, and ensure that outreach providers visit them less frequently.
- Evaluate the outreach schedule to ensure that resources are being efficiently allocated. If you need to increase geographic coverage above the 75% threshold, use the map and schedule to find outreach efforts that you can reallocate to other locations.
- Make the outreach coordination document(s) available after the meeting, and ask participants to update the schedule as their plans change. Consider making the schedule on Google Docs so that workers can easily edit it.

HIFIS 4 TIPS:

- Currently, outreach isn't captured well in HIFIS.

Maximize provider participation

5. What percentage of providers serving people experiencing homelessness (who are not street outreach) (e.g., shelters, housing resource centres, transitional housing) report data[4] to your By-Name List using a common assessment tool[5]?
    - ❑ 100% of providers report data into the By-Name List
    - ❑ 90% or more of providers
    - ❑ 75%-89% of providers
    - ❑ 50%-74% of providers
    - ❑ 25%-49% of providers
    - ❑ Less than 25% of providers

❖ 75%-100% of the community is covered = CREDIT TOWARD QUALITY

A real-time representation of the total number of individuals experiencing homelessness relies on accurate and complete data entry. Every agency providing services to homelessness populations should be reporting data and status changes to the By-Name List. Although its

[4] Either directly add or change the status of people on your BNL or report information to someone who makes those changes in the BNL.

[5] Examples of common assessment tools typically used in Canada include the VI-SPDAT and SPDAT suite of tools, the VAT and the YAP. Communities may capture additional information to these previously mentioned assessment tools (that assess for acuity) to determine eligibility for coordinated access. The point of this question being that everyone in your community is using the same tools and capturing the same information if they are contributing to your BNL.

ideal to have 100% participation, you likely have sufficient data to project your community's progress towards functional zero if you estimate that at least 75% of local agencies are reporting data into your list.

TIPS:

- List all the agencies/programs in your community that serve people experiencing homelessness. In larger communities, you may begin with just those agencies/programs specifically funded to serve homelessness, whereas in smaller communities you are likely going to include other service systems (e.g., mental health, addictions, VAW). Next to each one, indicate if they (a) use the common assessment tool you have adopted and (b) contribute data to your By-Name List.
- If at least 75% of the agencies/programs you listed are using the common assessment tool (or have established a written referral protocol with another agency/program responsible for conducting the common assessment) and contributing data—then your provider participation is sufficient for you to have confidence in your By-Name List's data.
    - Please note that if you are just missing one or a few providers, but that provider(s) represents a substantial proportion of the system (e.g., shelter beds, outreach workers, or a sizable percentage of transitional housing beds), then this/these providers need to be included in your community's determination of whether or not you have 75% or more of providers participating in your BNL process.

- If less than 75% of the agencies/programs are aligned—or if more than 75% are aligned but key provider(s) are missing—then you need to increase provider buy-in.
    - Determine if you need one "big fish" agency to come on board or several agencies. Analyze their reasons for not having aligned yet, and plan to address those reasons. Consider if they clearly understand your effort's goals, intentions, and protocols. Look for logistical or technological obstacles that are getting in the way; what resources can you martial to help clear the obstacles? Work to solve that problem and set an ambitious goal of getting some or all of them on board within the next three months. If they have privacy concerns, share with them your Privacy Impact Assessment or refer the 20KHomes website Resources page for information on privacy.

HIFIS 4 TIPS:

- HIFIS 4 doesn't keep track of the percentage of providers in your community using HIFIS, however, it does have a wide array of features and modules that support a variety of uses (e.g., housing loss prevention, shelters, housing first programs, and food banks).

Include unique identifier

6. Does your By-Name List include a Client ID or other unique identifier to prevent duplication of client records and facilitate coordination between HIFIS and the By-Name List?

   ❑ Yes ❑ No

❖ YES = CREDIT TOWARDS QUALITY Duplicate client records result in inaccurate accounting of the number of individuals experiencing homelessness on your By-Name List, so its critical that you use some type of unique identifier, particularly in instances when HIFIS is not the database used to create and manage the By-Name List. A unique identifier also enables you to share list data while protecting client privacy.

TIPS:

- If HIFIS or another HMIS is hosting your community's BNL, ensure that your BNL has a field for unique Identifier.
- If your community is not using HIFIS or another HMIS, determine if there is already a unique ID system that can be applied to all providers for the BNL.
- If there is no system for assigning a Unique ID, determine how Unique IDs will be generated (a series of numbers and letters).
- Create a field in your BNL to populate with Unique ID.
- Program that field to automatically generate a Unique ID when a client is added to the BNL.
- If you cannot program your BNL to automatically generate that unique ID, then ensure that there is a Quality Assurance process for having the BNL manager populate the unique ID BNL field when individuals are added to the BNL.
- Use that unique ID to de-duplicate your BNL, a process that should occur at regular, predetermined intervals.

HIFIS 4 TIPS:

- HIFIS already generates a unique Client ID for each client – no additional steps are required
- You can, additionally, turn on a setting to "Use Default File Numbers" (in Administration > Application Settings) to automatically generate a unique file number for each client. The file number generated is based on the Client ID, but it's easier for staff to reference.

Track newly identified individuals

7. Does your By-Name List track the total number of newly identified individuals experiencing homelessness each month? This figure represents part of your monthly inflow.

❑ Yes ❑ No

❖YES = CREDIT TOWARD QUALITY

It's critical your list include inflow data to assess whether you have the capacity to house these individuals every month. Additionally, without data on inflow, it becomes impossible to make informed projections about when your community will reach functional or absolute zero on chronic homelessness.

TIPS:

- Determine if your common assessment form captures date of assessment.
- If not, add this question to your common assessment form.
- Ensure that your process for tracking homeless individuals that do not consent to a full assessment includes collecting the date on which a person was identified.
- Create a field in your BNL for date of assessment and/or date added to the BNL.
- Use the date of assessment field to sort or filter your BNL to obtain a list of people that have been newly assessed and added to the list for the month you are reporting data for.
- Cross reference this filtered list with the rest of your BNL to determine if this individual is already on the list and has a unique ID.
- If there are duplicate records, reconcile these duplicates so there is just one record per client on your BNL.

HIFIS 4 TIPS:

- HIFIS does this automatically.
    - When you add a client to HIFIS, there's a date associated with when the client was created.
    - When you assess a client, there's an assessment date recorded.
    - When a client books into a shelter, there's an intake date for their shelter stay.

Track without a full assessment

8. Does your By-Name List have a way to track individuals actively experiencing homelessness who have not consented to undergo a full assessment[6]?

❑ Yes ❑ No

❖ YES = CREDIT TOWARD QUALITY

To use your community's By-Name List as the vehicle for measuring progress toward functional zero chronic homelessness, the By-Name List must account for all known households actively experiencing homelessness, even if they are refusing services or have not consented to a full assessment. Like a point-in-time count, each person should be accounted for, as long as there is reason to believe they are experiencing homelessness, without including personal identifying information that could be shared between agencies. Your community should take note of federal, provincial and local privacy guidelines as you develop your process.

TIPS:

- Determine what pieces of data will be tracked for individuals that do not consent to a full assessment (e.g., PiT/Registry Week Tally Sheet).
- Determine who will be collecting this data.
- Determine how this data will be accounted for on your BNL (e.g., will it be integrated or a separate "sidecar" list?).
- Determine how this data will be used. One use should be for aggregate reporting of actively homeless individuals.
- Apply a unique ID to these records to ensure Quality Assurance processes for de-duplication of records.
- Based on your above decisions, consult legal and/or privacy resources to understand considerations of adding these people to a list.
- Include these considerations in user consent process for accounting for individuals that do not consent to a full assessment.
- Please note that these legal considerations may need factor in to adjustments to the above decisions regarding what information will be collected, where the data will go and how the data will be used.
- Ensure the consent and data collection process for people that elect to not undergo a full assessment is uniformly applied.

---

[6] A full assessment is whatever information is required and used in your community typically to add someone to your BNL.

HIFIS 4 TIPS:

- If a client completely refuses to consent to you collect their information, you can't put them into HIFIS.
- If a client is okay with you collecting their information, but not sharing it, you can enter them into HIFIS and indicate that their consent is "Declined – Anonymous"
- If a client is okay with you putting them into HIFIS, but doesn't want to do an assessment, you can start an assessment and then indicate that the client has declined to be assessed. This way, you can track declined assessments.
- In the future, there may be a Prioritization module in which communities can define what criteria makes a client eligible to be on a Priority List. Consider clients that don't have a full assessment when defining your community's Priority List in HIFIS.

Track those becoming chronic[7] after initial assessment

9. Keeping in mind that chronic status can change over time, is your community's BNL able to track when individuals become chronically homeless at any point after they are initially assessed?

❑ Yes ❑ No

❖YES = CREDIT TOWARD QUALITY

In order to do this, a community should be tracking the following data fields: 1) Length of current homelessness episode at initial assessment, and 2) Date of identification.

Accurate data: Because persons aging into chronic homelessness may compose a significant portion of a community's inflow, a community must track this data to accurately account for its chronically homeless population.

Prioritization: Tracking individuals aging into chronic homelessness enables appropriate prioritization of resources that will best serve these individuals.

Prevention of chronic homelessness: Identifying individuals who will soon age into chronic homelessness enables a community to focus interventions to prevent new incidences of chronic homelessness.

[7] Chronic homelessness refers to individuals, often with disabling conditions (e.g. chronic physical or mental illness, substance abuse problems), who are currently homeless and have been homeless for six months or more in the past year (i.e., have spent more than 180 cumulative nights in a shelter or place not fit for human habitation)

TIPS:

- Determine the data fields that need to be collected from clients to assess whether an individual is chronically homeless.
  - To do this, a community should track the following fields:
    - Number of days/months homeless in part year
    - Length of current homeless episode at time of assessment
    - Date of identification
- Ensure that those data fields are on your common assessment tool being used across the sector.
- Create a field in your BNL that is formatted to indicate that a person is chronic at the time they "age-in" to chronicity.
  - This field should be set to automatically indicate that someone is chronic on their "age-in" date.

HIFIS 4 TIPS:

- It's very important to fill in a client's Housing History in HIFIS – this is where chronic and episodic status are calculated. Collect this data on intake, and every time a client returns from a period away from services!
- A client's Housing History includes a housing type (e.g. campsite, abandoned building, shelter, transitional housing, hospital), and a start and end date. HIFIS can calculate durations and episodes from this data.
- Having the previous year's worth of housing history for each client ensures that HIFIS can definitely tell whether a client is chronic, episodic, both, or neither. That way, you don't need to keep track of the "age-in" date, HIFIS does it automatically.
- HIFIS also includes shelter and transitional housing book-ins to calculate chronic and episodic homelessness.
- A HIFIS administrator can use their community's Housing Continuum to categorize which housing types count as being homeless and which count as being housed.

Track returns to list

10. Does your By-Name List track individuals experiencing homelessness who returned to active within the past month? For example, and individual was previously designated as "Housed" or "Inactive" and began seeking housing or services again. This figure represents part of your monthly inflow.

❑ Yes ❑ No

❖ YES = CREDIT TOWARD QUALITY

Tracking this data constitutes your outflow data supporting measurement towards functional and absolute zero on chronic homelessness. Understanding how many people house themselves and how many are housed through programs provides valuable data on demand for supportive housing programs.

TIPS:

- If a new record is added to your BNL, ensure there is a process by which you are de-duplicating the list.
- If this person is already on your BNL, ensure you can edit their record and change their status from 'housed' or 'inactive' to 'active'.
- Record the date of this status change so that when you report your monthly measures, this person is included in your actively homeless number.
- Ensure that you remove the second record from the BNL to avoid having duplicate records.

HIFIS 4 TIPS:

- When a client that you haven't seen before comes to your agency for service, before adding a new client record, first use the Client Search function to see if the client already exists in HIFIS.
- When you're adding a new client to HIFIS, the software automatically checks for existing clients with similar names and suggests they might be the client you're looking for.
- When working with a client that has been inactive for a while, be sure to update the client's Housing History to account for the time that has passed since the last time the client was receiving services.
- If you accidentally add a duplicate client, there is a Client Merge function (in Administration > Client Merge)