

# 10 Steps to Create and Use A By-Name List

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Below are 10 steps to help guide your community in the creation and use of a By-Name List. Note, these steps do not have to be implemented in this order. Use this information in the way that makes the most sense for your community.

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## STEP #1 – Learn About By-Name Lists

- Go to the [By-Name List page](#) on the BFZ-C website under “Resources”. There you will find a By-Name List Q&A, webinars, videos, tools and sample materials on By-Name Lists.
- Most importantly, review the [BNL Scorecard 2.0 Guide](#) and complete the [BNL Scorecard 2.0 Scorecard](#) to learn more about the 12 key areas of a quality By-Name List.

## STEP #2 – Clarify Your Scope and Build Community Will

- Your community will need to consider the following questions as you begin to develop your By-Name List:
  - What geographical area will our By-Name List cover?
  - Will the By-Name List initially include everyone experiencing homelessness or a smaller sub-group (e.g., chronic/high acuity only, youth, families, etc.)?
  - Which agencies/programs will refer and report data to the By-Name List
  - Which agencies/programs will receive referrals from the By-Name List?
  - Who will host and manage the list?
- Through any of the remaining steps you will likely need to continue building community will. Review the following [presentation](#) and [tool](#) for ideas about how to build community will.

## STEP #3 – Pick Your Tools - A Database & Common Assessment Tool

- You will need a database to hold your By-Name List. Note that work is underway to develop a HIFIS By-Name List Module. In the meantime, you can go to the [By-Name List](#) page on the BFZ-C website under “Resources” to find a number of example Excel By-Name List templates that includes all the elements for a quality By-Name List that you can use right away and customize as needed.
- You will need to choose the common assessment tool(s) that best meets your community’s needs. See further information about common assessment tools on the [Coordinated Access](#) page. Consider contingency plans for people who do not want to complete the assessment.

## STEP #4 – Complete a Registry Week or Build on an Existing Coordinated Access System or HMIS

- A Registry Week is a great way to “kick start” a By-Name List. Go to the BFZ-C website “Resources” section where you will find a drop-down that includes the [Registry Week Toolkit](#) with all the tools and information you will need to complete a Registry Week.
- Sometimes communities already have a By-Name List started if they have a coordinated access system and/or a comprehensive database (HIFIS/HMIS) from which they can use and continue to build on towards a quality By-Name List.

## **STEP #5 – Set A Goal, Gather Resources and Prepare for a By-Name List Post Registry Week**

- Wherever possible, set a goal around housing people (shorter or longer-term) and line-up housing support resources that can be offered to people who have been prioritized (according to your locally defined priorities) from your By-Name List.
- Consider as much as possible, the items in Step #6 before your Registry Week. However, you don't have to have it all figured out to move forward – simply plan to continue working on these items following your Registry Week.

## **STEP #6 – Create Policies and Processes to Manage Your By-Name List**

- Along with creating your own local prioritization policy (see Step #7), be sure to create policies and procedures to add, remove and support people on your By-Name List through agency participation, street outreach, and case-conferencing so that it doesn't become a static waitlist. Go to the [Coordinated Access](#) page on the BFZ-C website under "Resources" for sample By-Name List/Coordinated Access frameworks, policies and procedures and other resources.

## **STEP #7 – Create a Coordinated Access System and Prioritize People for Housing Support Resources**

- Use your By-Name List to identify those eligible for your coordinated access system. From there, you can apply locally defined priorities to prioritize offers of housing support resources.
- Go to the [Coordinated Access](#) page on the BFZ-C website for further information on coordinated access and prioritization.
- Self-assess the strength of your Coordinated Access (CA) system using the CA Scorecard 2.0 ([online CAS Scorecard](#) & [CA Scorecard Guide](#))

## **STEP #8 – Continue to Take the By-Name List Scorecard (BNL Scorecard)**

- Use the [BNL Scorecard 2.0](#) quarterly as a self-assessment tool to identify areas for improvement and work towards having a quality By-Name List. Go to the [By-Name List](#) page on the BFZ-C website under "Resources" to review all the BNL Scorecard 2.0 materials including the [BNL Scorecard 2.0 Guide](#) and other tools.

## **STEP #9 – Achieve a Quality By-Name List and Continue to Sustain and Improve It**

- A "Basic Quality" By-Name List is achieved once you have been verified by BFZ-C as having met a 11/11 on the By-Name List Scorecard along with additional elements (see the [BNL Scorecard 2.0 Guide](#)). From there, you will want to continue to sustain and make improvements - aiming for an "Advanced Quality" By-Name List by scoring a 12/12.

## **STEP #10 – Use Your By-Name List System-Level Data**

- You can use By-Name List data and dashboards from your Performance Management Tracker (available to BFZ-C communities) to set performance improvement goals and monitor key indicators for reaching and sustaining [functional zero on chronic homelessness](#). Go to the [By-Name List](#) page under "Resources" for sample dashboards.