

By-Name List (BNL) Scorecard 2.0 Guide

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Introduction

What is the By-Name List (BNL) Scorecard 2.0 Guide?

This Guide explains what the By-Name List 2.0 Scorecard (BNL Scorecard) is, makes suggestions for how to use it, and walks you through the BNL Scorecard questions and next steps to achieve a quality By-Name List. For each of the BNL Scorecard questions further information is provided on how to interpret and score the questions, tips and resources for moving forward, and tips for HIFIS 4.

This Guide is not the BNL Scorecard itself. The BNL Scorecard and further information about By-Name Lists can be found on the [By-Name List](#) page under resources on the Built for Zero Canada website at www.bfzcanada.ca (for Built for Zero Canada communities it can be found in the Change Package under Tools and Scorecards).

Please read our thoughts on how to use this tool below before continuing onto the BNL Scorecard questions.

What is the BNL Scorecard 2.0?

The BNL Scorecard is a 12 question self-assessment tool that provides communities a snapshot of local progress towards a quality By-Name List. The Scorecard assists communities to identify areas for improvement and plan their next steps.

The BNL Scorecard will support communities to collect robust data that will help them meet the new federal Reaching Home requirements for implementing coordinated access and reporting on chronic homelessness reduction outcome measures. Quality By-Name List data is essential to understanding homelessness in your community and to reaching and sustaining functional zero on chronic homelessness (as the first step to ending all homelessness in Canada).

How was the BNL Scorecard 2.0 Developed?

The BNL Scorecard was first developed by Community Solutions, an American organization focused on helping communities end homelessness and the conditions that create it. 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. The Canadian Alliance to End Homelessness (CAEH) worked with Community Solutions to adapt the BNL Scorecard for Canada in 2016. The BNL Scorecard was updated in consultation with CAEH Built for Zero Canada communities, the federal Homelessness Policy Directorate and other key partners, and released in December 2018.

How to Use the BNL Scorecard 2.0

Invite the right people to the room. The lead organization should take the BNL Scorecard quarterly. 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 policies and identify service strengths and gaps (or perception of gaps).

The BNL Scorecard is organized into three sections:

1. Community Participation and Coverage
2. Policies and Procedures
3. Data Infrastructure

It includes three levels of quality:

1. Basic Quality BNL (10/10), and
2. Advanced Quality BNL (12/12).

Each of these levels builds upon the other and is intended to assist you to shrink the change and focus your implementation efforts on what needs to happen first. To receive a point toward Advanced Quality, you must also answer positively to *all* Basic Quality questions.

By-Name List Scorecard 2.0

COMMUNITY PARTICIPATION & COVERAGE	POLICIES & PROCEDURES	DATA INFRASTRUCTURE	
1. Maximize provider participation	4. Inactive policy	7. Unique identifier	10. Track key connections at inflow
2. Reach unsheltered homeless	5. Track without full assessment	8. Track populations & changes over time	11. Track homeless status and outflow
3. List all known homeless	6. Timely/accurate data updates	9. Track inflow	12. Track time on list

Blue – Basic out of 11 Red – Advanced out of 12

Completing the BNL Scorecard should take about 60 minutes, depending on how much conversation is generated. See the [sample exercises](#) to facilitate discussion when completing the BNL Scorecard with larger groups.

Your score is a baseline, not a judgement. It should help you create action plans and measure improvement towards a comprehensive quality By-Name List. Use the tips and resources available in the Guide. Reach out to [CAEH](#) if you would like additional support.

Note that scoring an 11/11 on the By-Name List Scorecard for Basic Quality on chronic homelessness does not mean that your By-Name List is complete. The quality of your By-Name List is measured not only by the BNL Scorecard, but also by the quality of the data that your community's By-Name List produces. The ability of your By-Name List to produce reliable data is just as important as having a 11/11 or 12/12 on the BNL Scorecard. Without 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

Before your community feels confident that your By-Name List is producing reliable data, you should review the six key BNL data points month over month, to ensure your data is "balanced". Balanced data means that your inflow, outflow and actively homeless numbers reconcile from month to month. Further information about the six BNL data points and balanced data is included in the [Data Balancing Workbook](#).

Continuous improvement is the name of the game! Keep using the BNL Scorecard to work towards a score of 12/12 with reliable data for all people experiencing homelessness to achieve an Advanced Quality By-Name List.

How to Use this Guide

The 12 questions of the Scorecard are included below organized by the three section headers:

1. Community Participation and Coverage
2. Policies and Procedures
3. Data Infrastructure

After each question below you will find the following:

- A further description and explanation of each question.
- Tips and resources to help you get to "yes" on each question, and
- HIFIS 4 tips and tricks are included where applicable.

In the BNL Scorecard, each question is linked to the appropriate questions in this Guide.

BNL Scorecard 2.0 Questions

Part 1: Community Participation and Coverage

1. Maximize Provider Participation

BNL Scorecard 2.0 Questions:

1.1 A Are 90% + of homelessness response providers using a common assessment tool (or referring to others using a common assessment tool) for the purposes of the BNL? (Basic)

Yes

1.1 B Are 90% + of homelessness response providers adding or referring all people experiencing chronic homelessness to the BNL, 90%+ of the time, at minimum once a month? (Basic)

Yes

1.1 C Are 90% + of homelessness response providers updating information on all people experiencing chronic homelessness to the BNL, 90% + of the time, at minimum once a month? (Basic)

Yes

BASIC 1

1.2 A Are 90% + of homelessness response providers adding or referring ALL people experiencing homelessness to the BNL 90% + of the time, at minimum once a month? (Advanced)

Yes

1.2 B Are 90% + of homelessness response providers updating information on ALL people experiencing homelessness to the BNL 90% + of the time, at minimum once a month? (Advanced)

Yes

1.3 A Are 75% + of other service providers adding or referring ALL people experiencing homelessness to the BNL 90% + of the time, at minimum once a month? (Advanced)

Yes

1.3 B Are 75% + of other service providers updating ALL people experiencing homelessness to the BNL 90% + of the time, at minimum once a month? (Advanced)

Yes

1.3 C Are 75% + of other service providers using a common assessment tool (or referring to others using a common assessment tool) for the purposes of the BNL? (Advanced)

Yes

ADVANCED: 1

Basic & Advanced: Maximize Provider Participation

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 it's ideal to have 100% participation, you likely have sufficient data to project your community's progress towards functional zero if you identify that at least 90% of homelessness response providers are reporting data. Advanced engagement would include 75% of other service providers also reporting data into your BNL.

Tips & Resources: Maximize Provider Participation

- Use the [Provider Participation Tool](#) (tab #5) to list all the homelessness response providers and other service providers in your community that serve people experiencing homelessness. In larger communities, you may begin with just those providers funded to serve homelessness, whereas in smaller communities you are likely going to include other service providers (e.g., mental health/addictions, income support, VAW). Next to each one, indicate if they are adding/referring, updating the BNL, and/or are using the BNL common assessment tool.
- If less than the needed percentage of the agencies/programs are aligned 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 marshal 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 BFZ-C website [By-Name List page](#) for information on privacy.
- 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 the needed percentage or more of providers participating in your BNL process.

HIFIS 4: Tips & Resources: Maximize Provider Participation

- HIFIS includes a Directory of Services that you can use to help with your community mapping.
- HIFIS 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).
- You can give providers access to HIFIS and assign them rights that correspond to their involvement with the BNL. For example, you could give providers rights that just allow them to see if a client already exists in HIFIS, add new clients, and add assessments (like the VI-SPDAT). You don't need to require them to use HIFIS to record their case notes or other activities, but providing them direct access to HIFIS can help streamline the process of adding, referring, and updating clients on the BNL!

2. Reach Unsheltered Homeless

BNL Scorecard 2.0 Questions:

2.1 A Have hotspots and coverage needs been clearly mapped out, informed by your data and regularly assessed, to ensure you are clear on where to focus efforts to reach all unsheltered individuals within your community? (Basic)

Yes

2.1 B Has the coverage of your current reach been assessed against this map and have you coordinated efforts to ensure services are deployed at the locations and the times that they are most likely to effectively engage with unsheltered homeless individuals, while minimizing duplication between providers? (Basic)

Yes

BASIC: 1

2.1 C Do you have a documented policy that clearly states how your reach to unsheltered individuals will be deployed and how they will work with each other to swiftly connect individuals to housing? (Advanced)

Yes

ADVANCED: 1

Basic & Advanced: Reach Unsheltered Homeless

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 & Tricks: Reach Unsheltered Homeless

- See [Coordinate Outreach Coverage – Key Considerations, Tips & Resources](#)

HIFIS 4 Tips & Tricks: Reach Unsheltered Homeless

- You can use HIFIS to track which clients are currently unsheltered by updating their housing history. In the housing history, you can record if a client is, for example, sleeping in a vehicle, or at a campsite. You can record either a specific address or a general location for this.
- Having outreach teams fill out the housing history for their clients provides an added benefit: HIFIS will automatically be able to calculate whether clients are chronically homeless, and when they “age in” to chronic status.
- Currently the activities of street outreach teams isn’t captured well in HIFIS. What’s missing is the ability to map contacts with people who are unsheltered. You can record who you met with and when, but can’t geo-tag a location for these interactions.
- If an outreach team is using another module in HIFIS, such as Case Management, they can access their case notes via a mobile device which they can bring out into the field.

3. List All Known Individuals

BNL Scorecard 2.0 Questions:

3.1 A Does your BNL include data from each of these locations: (Basic)

- People who are unsheltered living in a place not meant for human habitation (e.g. streets, cars, abandoned buildings, etc.).
- People in shelter, safe havens, seasonal or overflow beds; or hotel paid for by service provider.
- People in transitional housing (where it exists and there is a clear service end-date that if other housing is not found, the person could be discharged into homelessness). Please note the community should continue to include them on the BNL until they are permanently housed.
- People remain active on your list when entering an institution (e.g. jail or hospital) (if stay exceeds your inactivity policy e.g.,90 days, you may change their status to inactive).
- People experiencing hidden homelessness (those living temporarily with others but without guarantee of continued residence or immediate prospects for accessing permanent housing).

3.1 B Does your BNL capture 90%+ of all known and consenting people experiencing chronic homelessness, including: (Basic)

- Adults
- Youth
- Families

BASIC: 1

3.2 Does your BNL capture 90%+ of ALL known and consenting people experiencing homelessness, including: (Advanced)

- Adults
- Youth
- Families

ADVANCED: 1

Basic & Advanced: List All Known Individuals

Selecting all categories above means your community has taken sufficient measures to ensure that every known individual is accounted for and that your By-Name List is comprehensive. This step enables you to use your BNL to navigate towards functional zero chronic homelessness.

Tips & Resources: List All Known Individuals

- This question ensures that you are not excluding data from any of these locations on your BNL (e.g., a BNL that only captures emergency sheltered and unsheltered individuals but not those who are hidden homeless or in time-limited housing).
- It asks you to establish pathways to receive data for your BNL from each of these locations.
- Your initial goal is to have “at least some but not necessarily all” people from each location. Your ultimate goal is to be able to check that you have confidence that you are capturing at least 90% of people experiencing chronic homelessness and then 90% of all people experiencing homelessness (who are known and consenting).
- 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.
- 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 & Tricks: List All Known Individuals

- 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 list of all known individuals!
- HIFIS includes: people who consented to receive services but disappeared before you could assist them; people who stayed in shelter 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.
 - It’s really important to update an individual’s “housing type” (which could be supportive housing, shelter, or even unsheltered options) so that HIFIS can distinguish between clients who are housed and clients who are homeless.
- HIFIS doesn’t include people who have 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.

Part 2: Policy and Procedure

4. Implement Inactivity Policy

BNL Scorecard 2.0 Questions:

4 Has your community established a written policy that specifies the number of days of inactivity (i.e. the person cannot be located) after which a person's status will be changed to "inactive," and which includes protocols to attempt to locate an individual before they are moved to inactive status? (Basic, Advanced)

- Written policy
- Implemented policy

BASIC:	1
ADVANCED:	1

Basic & Advanced: Implement Inactivity Policy

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 & Resources: Implement Inactivity Policy

- See [Inactivity Policy – Key Considerations and Examples](#).

HIFIS 4 Tips & Tricks: Implement Inactivity Policy

- 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.
- A custom report may also be able to filter out clients who haven't received services in a while.

5. Track Without Full Assessment

BNL Scorecard 2.0 Questions:

5 A Does your BNL include people who have provided consent but have not yet completed a full assessment?
(Basic)

Yes

BASIC: 1

5 B Does your BNL include an anonymous count of people experiencing chronic homelessness who have not yet provided consent to service and/or to have their name or information shared with others? (Advanced)

Yes

ADVANCED: 1

Basic & Advanced: Track Without Full Assessment

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 & Resources: Track Without Full Assessment

- Determine the minimum amount of information necessary to add someone who has consented to your BNL but has not yet completed a full assessment (e.g., will you add someone to the list with simply a name and consent and work to add more from information through further engagement or does your community require more information up-front e.g. to enter into HIFIS or to ensure de-duplication).
- Determine how you will include a count of people experiencing chronic homelessness that have not yet consented on your By-Name List. Consider if it will be integrated or a separate "sidecar" list e.g.:
 - Integrated - list each person anonymously on your BNL without identifying information) (e.g., consider the type of information collected on the [PiT/Registry Week Tally Sheet](#)).
 - Side-car – options may include having your coordinated outreach maintain their anonymous list (unduplicated to the degree possible) outside of your list and just provide an overall count to your list at least monthly or have the organization administering your BNL coordinate a separate anonymous list alongside your BNL.

- In both cases, continue the work you have started in BNL Scorecard Question #2, “Reach Unsheltered Homeless” to coordinate as a community around continuing to outreach and engage people who have not yet provided consent.
- Determine who will be collecting this data.
- Determine how this data will be accounted for on your BNL
- 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 factor into 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 data collection process for both people that have not yet consented and/or that elect to not undergo a full assessment is uniformly applied.

HIFIS 4 Tips & Tricks: Track Without Full Assessment

- If a client completely refuses to consent to you collecting 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.

6. Timely/Accurate Data Updates

BNL Scorecard 2.0 Questions:

6 Has your community implemented an approach for keeping your BNL up-to-date and accurate, including timelines for provider data submission and ongoing quality assurance and has this approach been documented in policies/protocols? (Basic, Advanced)

- Written (Basic)
- Implemented (Advanced)

BASIC:	1
ADVANCED:	1

Basic & Advanced: Timely/Accurate Data Updates

Your BNL should be as real-time as possible with updates occurring at least monthly (as the outer-limit for what is considered “real-time”). Creating clear timelines and processes for keeping your BNL up-to-date and accurate will ensure your community has confidence in your data for decision-making and monitoring progress. Documenting these expectations in guidelines/policies/procedures helps promote clarity on expectations (especially when there is a lot of change in the community and/or staff turnover).

Tips & Resources: Timely/Accurate Data Updates

- Determine how often updates should be made and the process for updates. It is helpful to engage your community in this decision to create greater buy-in.
- Assign each person on your BNL to a worker or agency in your community. That person or agency is responsible for updating the record. If you can't do this for everyone on your list, start with the people who are the highest priority in your community.
- Examples of how communities up-date their BNL:
 - BNL is reviewed at weekly, bi-monthly, or monthly meetings and updates are recorded at that time (this approach can be time consuming).
 - Providers are asked to complete an “update form” either immediately as changes are known or by a certain day each week. Some ideas for update forms could be a Google Form, Survey Monkey, Word document or an Excel sheet with the people from the BNL that worker is responsible for that they review and make changes (highlighted) to and send in. If you are using HIFIS 4/HMIS as your BNL or to inform you BNL, changes can be made directly into the database.
 - Update forms could be hand-delivered at a meeting and/or sent by email, fax or portal (consider how this information will be kept secure, e.g. use their unique identifier, password protected document, secure portal, etc.)
- Examples of how communities ensure accuracy of their BNL:
 - The BNL administrator balances the data each month. You can use this [Data Balancing Workbook](#).

- The BNL administrator regularly checks for when an entry was last updated. For example, by reviewing the “last updated date column” in the BNL or reviewing HIFIS 4 data from shelters.
- The BNL administrator creates a BNL data dashboard and shares regularly (email, meetings, etc.) so that others can help verify the data.
- Monthly data cleans (or more frequent!) – go through entry by entry making sure everything makes sense and is up to date.

HIFIS 4: Tips & Tricks: Timely/Accurate Data Updates

- Whatever your approach to using HIFIS 4 to complement your By-Name List, it’s only as good as the data that has been entered into it. There are many ways in which HIFIS works well when it has up-to-the-minute data - real-time sheltered bed availability, for one. Your By-Name List might be a report you run through HIFIS, which would pull whatever data has currently been entered. Or it might be a page you can go into HIFIS to see who’s currently on the list. The value of using HIFIS is lessened significantly if it’s not being regularly kept up to date.
- There are auditing features in HIFIS 4 which allow supervisors to monitor the timeliness of the data entry of their staff.

Part 3: Data Infrastructure

7. Include Unique Identifier

BNL Scorecard 2.0 Questions:

7 Does your BNL include a HIFIS/HMIS ID or other unique identifier to prevent duplication of client records and facilitate coordination between HIFIS/HMIS and the BNL? (Basic, Advanced)

Yes

BASIC:	1
ADVANCED:	1

Basic & Advanced: Include Unique Identifier

Duplicate client records result in inaccurate accounting of the number of individuals experiencing homelessness on your By-Name List, so it's critical that you use some type of unique identifier, particularly in instances when HIFIS/HMIS 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 & Resources: Include Unique Identifier

- 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 & Tricks: Include Unique Identifier

- HIFIS 4 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.

8. Track Populations and Changes Over Time

BNL Scorecard 2.0 Questions:

8.1 A Does your BNL track populations, including at minimum: (Basic, Advanced)

- Current chronic homeless (Basic)
- Gender (Basic)
- Indigenous (Basic)
- Veteran (Basic)
- Age (Basic)
- Single or family (Basic)
- Multiple populations at once (e.g. can sort by chronic AND youth) (Basic)
- Others for which you have population/condition specific housing resources (if any) (Advanced)

8.1 B Does your BNL account for changes in populations after someone has already been added, specifically: (Basic, Advanced)

- Persons who have become chronically homeless after they are added to your BNL? (Basic)
- Persons who started in one population when they were added to your By-Name List but over time their status changes (e.g., youth to adult or single to family)? (Advanced)

BASIC:	1
ADVANCED:	1

Basic & Advanced: Track Population Changes Over Time

In order to track chronic homelessness, 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.

Tips & Resources: Track Population Changes Over Time

- 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 past 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 & Tricks: Track Population Changes Over Time

- Gender, indigenous status, veteran status, and age of clients are all mandatory fields in HIFIS. Staff need to complete extra steps to record a person's family and chronic homelessness status, but it's worth it!

- It is very important to fill in a client’s Housing History in HIFIS - this is where chronic and episodic status status are calculated. Collect this data on intake, and every time a client returns from a period away from services.
- A client’s Housing Hlstory includes a housing type (e.g. campsite, abandoned building, shelter, transitional housing, hospital), and a start date and an end date. HIFIS can calculate durations and episodes from this data.
- Having the previous year’s worth (three years is better) of housing history for each client ensures that HIFIS can definitely tell whether a client is chronic, episodic, or 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.

9. Track Inflow

BNL Scorecard 2.0 Questions:

9 Does your BNL track the total inflow into homelessness each month? This includes the number of newly identified (not necessarily assessed) people experiencing homelessness as well as those who returned to active homelessness within the past month (i.e. a person was previously designated as 'housed' or 'inactive' and began seeking housing or services again). These three data points represent your monthly inflow: (Basic, Advanced)

- Track 'newly identified' people
- Track 'returns from housed'
- Track 'returns from inactive'

BASIC:	1
ADVANCED:	1

Basic & Advanced: Track Inflow

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 zero on chronic homelessness.

Tips & Resources: Track Inflow

Newly Identified

- Determine if your form to add people to your By-Name List includes a date. 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.

Returns to List (from housing or inactive)

- 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.
- Avoid creating duplicate records or remove any duplicate records.

HIFIS 4 Tips & Tricks: Track Inflow

- It's easy to track Newly Identified in HIFIS. With an integrated system, if a client doesn't yet have a file in HIFIS, they must be new.
- If a client is Returning to the List, we can tell that too. If you're adding someone to the list, first search their name. They might already have a file in HIFIS, which you can then add to. You can look at their housing history to see if they've recently been housed, for example.
- HIFIS sometimes has difficulty between Returns from Housing and Returns from Inactive. Part of the reason for this is because so many times, we can lose track of a client. They leave a shelter and don't tell staff where they're going, or perhaps they tell a staff who doesn't update their client file. Then the client isn't seen in months - are they housed, or are they inactive? According to HIFIS, if the client's Housing History doesn't say that they're currently Housed, and we haven't seen them in a while, they must be inactive. To get the best data out of HIFIS, make sure your staff are very diligent in keeping the Housing History up to date - including after a client isn't being served any more.

10. Track Key Connections at Inflow

BNL Scorecard 2.0 Questions:

10 Does your BNL include a mechanism to track connections with the following at inflow (at minimum) to understand opportunities for diversion, prevention, and system engagement/improvement? (Advanced)

- Hospital, inpatient facility, or residential rehabilitation
- Corrections/justice/prison
- Child protection
- Family violence shelter/program
- From housing (new - not returning)
- From another community

ADVANCED: 1

Basic & Advanced: Track Key Connections at Inflow

This question aims to begin to understand some of the factors that may be influencing inflow to your BNL. It was developed with input from the Canadian Observatory on Homelessness, A Way Home Canada, BNL Scorecard 2.0 test communities, and Community Solutions. We are interested in understanding how communities are collecting this information. This question will likely continue to evolve over time.

Tips & Resources: Track Key Connections at Inflow

- Add a question to your BNL addition/referral documents that collects referral source and whether the person was recently discharged or came from any of these locations (e.g., last 30 days).
- Add column(s) to your By-Name List to record this data.

HIFIS 4 Tips & Tricks: Track Key Connections at Inflow

- Typically, when you have a new client, you're providing them with a service. For shelters, the service is a Stay. For other service providers, the service might be a Goods & Services transaction. For services like these, HIFIS includes a field called "Referred From" which contains a list of various organizations and entities locally. The list of organizations can and should be customized locally, and the Referred From field can be made into a mandatory field.

11. Track Homeless Status and Outflow

BNL Scorecard 2.0 Questions:

11 Does your community's BNL track the 'homeless/housed/inactive' status of all people experiencing homelessness on your BNL (including the date each status was changed)? Homeless status fields should include, at minimum, homeless status as well as two other status' that represent your monthly outflow - those who move into permanent housing and those who become inactive, per your inactive policy.(Basic, Advanced)

- Track homeless status
- Track permanent housing move-ins
- Track moved to inactive

BASIC:	1
ADVANCED:	1

Basic & Advanced: Track Homeless Status and Outflow

Homeless status fields should include at minimum homeless as well as the two status' that represent your monthly outflow - those who move into permanent housing and those who become inactive, per your inactive policy. This data is essential for understanding your rate of outflow and total active homeless.

Tips & Resources: Track Homeless Status and Outflow

- Note two equally important requirements: (1) a status field, and (2) the ability to date-stamp each change in status (as further outlined in Question #12).
 - If your By-Name List is self-contained inside other software, such as Excel, ensure that everyone's record includes a status field.
 - If your By-Name List pulls data from HIFIS/HMIS, 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.

HIFIS 4 Tips & Tricks: Track Homeless Status and Outflow

- The best way to track permanent housing move-ins is through the Housing Placement module, which is designed for use by Housing First and Rapid Re-Housing teams.
- For everything else, ensure that staff are updating the Housing History of clients. That's the best way to keep track of who's housed and who's homeless, how long people have been homeless, and who's chronically homeless.

12. Track Time On List

BNL Scorecard 2.0 Questions:

12 A Does your BNL track key dates in the housing process so that you can track the length of time for those processes and overall length of time on the BNL, including: (Basic)

- Date first added
- Date moved to outflow (housed or inactive)
- Date reactivated on the list from housing or inactive status

BASIC: 1

12 B Does your BNL track key dates in the housing process so that you can track the length of time for those processes and overall length of time on the BNL, including: (Advanced)

- Date first assessed
- Date required documentation completed (i.e. can immediately accept a housing resource offer)
- Date matched to a housing resource
- Date referred and/or accepted a housing resource

ADVANCED: 1

Basic & Advanced: Track Time on List

Some of the Basic Quality date tracking is mentioned in other questions (i.e., date first added and reactivated in #10 and date moved to outflow in #11). The additional Advanced Quality items begin to more fully map the housing process and your Coordinated Access system. Without this tracking, it is difficult to assess the performance of your coordinated access system. This data will allow you to identify areas for improvement and to monitor progress in accelerating housing move-ins. For maximum efficiency, track the key 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 & Resources: Track Time on List

- Map your local housing processes. More tools on this coming soon!
- Add columns to your BNL to capture the dates for the elements that are most relevant in your community.
- 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 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 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.

HIFIS 4 Tips & Tricks: Track Time on List

- It depends on how you're using HIFIS with your BNL, but HIFIS automatically date-stamps most actions. Encourage your staff to enter complete and timely information about your clients and you won't need to worry about manually tracking time on the list.