

BoS By Name List Report Guide

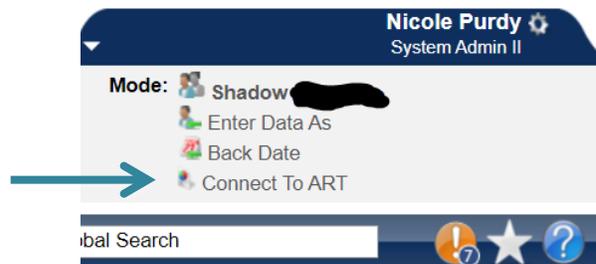
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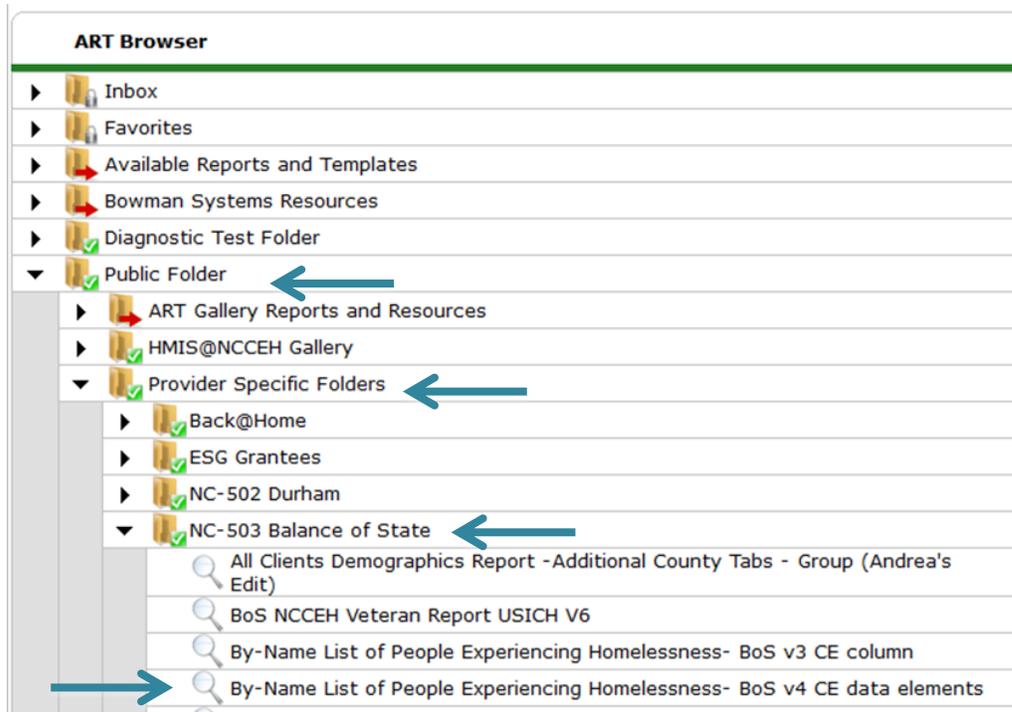
Running the By Name List Report:

The By-Name List report is an ART report that will be used for case conferencing, status review, flow through the Coordinated Entry system, and for visibility and/or data issues.

1. As with all ART reports you need to click Connect to ART to access and run the report.



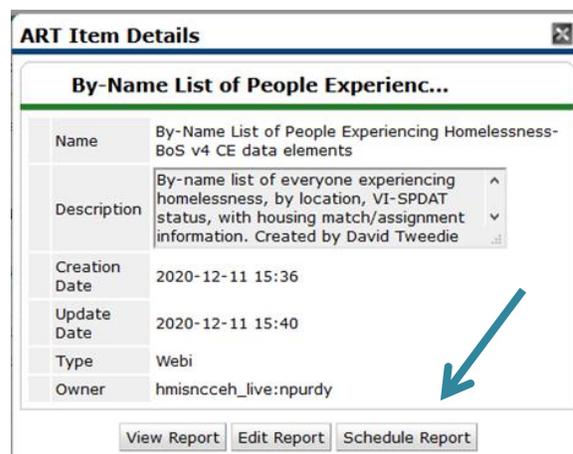
- Navigate to Public Folder then click triangle to open the next menu. Click the triangle next to Provider Specific Folders to open the next menu. Click the triangle next to NC-503 Balance of State to open the next menu. Then locate the most up to date By-Name List report.



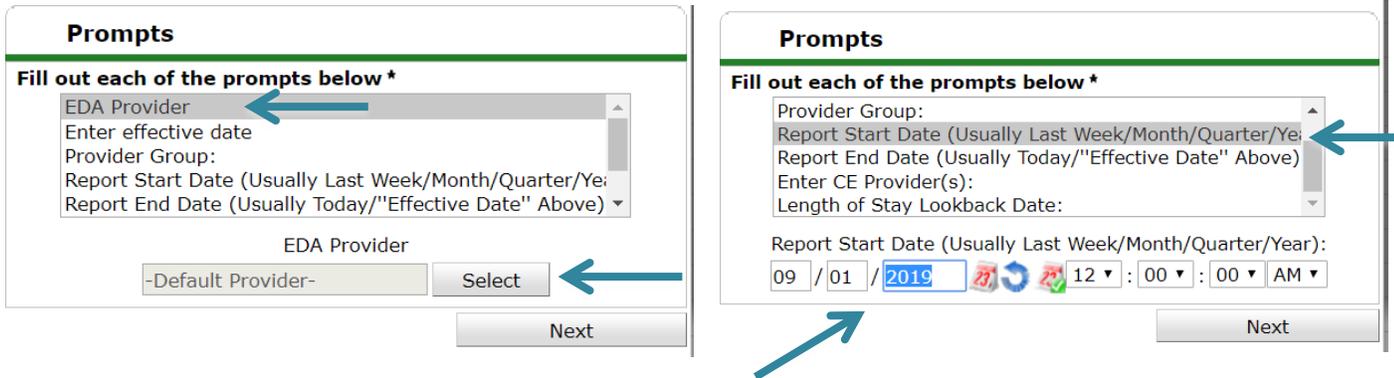
- Click the magnifying glass next to the By-Name List of People Experiencing Homelessness report.



- Click Schedule Report.



- A prompts box will pop up. Click on every prompt then click Select to access a search box. Date fields can be entered directly in the Prompts box. Do NOT hit the Next button until ALL the required prompts are completed.



- EDA Provider:** ALWAYS used. Select the CE or P&D Project.
- Enter Effective date:** This is the same as your End Date, often the same date that you are running the report.
- Provider Group:** ALWAYS used. Find and select your regional coordinated entry group or regional Back@Home reporting group.
- Report Start Date:** this should be the date you want to start looking at the data for. For case conferencing it will likely be the last week or two. You can run the report for longer lengths of time for other data analysis and quality purposes.
- Report End Date:** This is the same as your Effective Date, often the same date that you are running the report
- Enter CE Provider(s):** Find and select your CE project and/or your Back@Home Triage project.
- Length of Stay Lookback Date:** This will populate the Cumulative Length of Stay column. Select a date that is 3 years in the past to highlight people/households that have become chronically homeless. This is dependent on visibility and how far back you can see the data for that client.

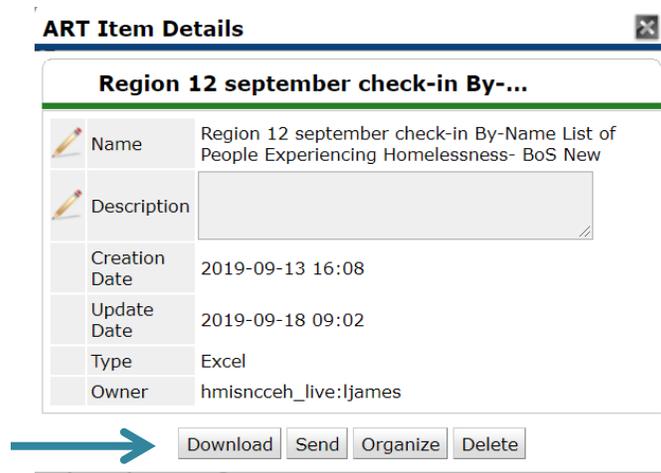
- After all prompts are completed click Next. The schedule report box will pop up.

- Name:** Enter a name that will distinguish it from other reports that are the same type.
- Report Format:** Select Excel.

- c. **Users Inbox:** Who's ART inbox should this report go to? Skip this step if it's you.
 - d. **Interval:** Select Once.
 - e. **Start Date:** When should the report start running? This is NOT the same as reporting dates. Usually, the current date and time.
 - f. **End Date:** When should the report stop running? This is NOT the same as reporting dates most often it's the same day as the start date. Change the end date time to one hour later than the start date time to give the report time to run.
7. Click Send. Once the report has finished running it will appear in your ART Inbox near the top of the screen. (It may take a few minutes) Click the magnifying glass next to the report name you want to view.



8. Click Download and then open the report that is downloaded.



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Report Columns on the By-Name List Report:

If fields are blank, then the information is missing, incomplete, or not visible on HMIS.

Personally Identifiable Information								
HMIS ID	First Name	Last Name	Age	Veteran? Y or N	HH Detail	# in Household	Is Client Chronically Homeless? Y or N	Disability? Y or N
555	a	smith	39	No (HUD)	Self (head of household)	1	No	No (HUD)
333	c	franklin	48	No (HUD)	Self (head of household)	3	No	No (HUD)
999	u	spiderman	59	Yes (HUD)	Self (head of household)	1	Yes	Yes (HUD)
888	thor	odenson	62	No (HUD)	Self (head of household)	1		No (HUD)
756	syvester	the cat	71	Yes (HUD)	Self (head of household)	1		Yes (HUD)
369	bugs	bunny	37	No (HUD)		1	Yes	
425	tweety	bird	57	No (HUD)	Self (head of household)	1	Yes	Yes (HUD)
987	tony	stark	45	No (HUD)		2		

1. **HMIS ID:** Client ID for clients on the report.
2. **First and Last Name:** Taken from name fields on HMIS.
3. **Age:** Calculated from Date of Birth field on HMIS. If Age is blank, DoB is not complete or not visible.
4. **Veteran? Y or N:** Taken from Veteran field on HMIS Client Profile.
5. **HH Detail:** Relationship to Head of Household. Should pull only Heads of Household. If column is blank, the relationship to head of household is not completed or visible on the project start.
6. **# in Household:** Total number of people in the household.
7. **Is Client Chronically homeless? Y or N:** Taken from the project interim chronic homeless yes or no question. If this column is blank, then item has not been completed by the CE project.
8. **Disability? Y or N:** Taken from the project entry. If this column is blank, then items have not been completed or are not visible.

Homeless Provider Information						
NC County of Service	CE Project? Y or N	Most Recent Front Door Provider	Most Recent Project Entry Date	Most Recent Project Exit Date	Length of Stay (Days)	Length of Stay (Cumulative)
Pitt	Yes	Homeless Shelter - ES - Private	7/9/2020		329	36
Pitt	Yes		2/10/2020		479	56
Pitt	Yes	Street Outreach - SO Private	3/3/2021		92	206
	No	Men's Shelter - ES- Private	6/11/2020		357	357
Pitt	Yes	Greenville Community Shelters - Pitt County - Emergency Shelter - ES	5/11/2021		23	221
Pitt	Yes		7/1/2019		703	89
Pitt	Yes		1/9/2020		511	74

9. **NC County of Service:** Taken from the project entry if this column is blank, that items has not been completed or is not visible.

10. **CES Project? Y or N:** Indicates if client has an entry into the Coordinated Entry Project that was selected in the CE Provider prompt (CE project and/or your Back@Home Triage project) when the report was run.
11. **Most Recent Front Door Provider:** Pulls the most recent HMIS service provider seen for the person/household. If blank, there is no project entry anywhere else other than the CE project.
12. **Project entry and exit date:** Pulls the entry and exit dates for the person/household's most recent HMIS service provider. If the client only has an entry into the CE project *and* the Current Provider column is blank, then it will pull the entry and exit dates for the CE project.
13. **Length of Stay:** Calculates the length of stay (or participation) for the people/households served by the provider listed in the Current Provider column.
14. **Length of Stay (cumulative):** Calculates the total lengths of stay (or participation) for the people/households served by the front door providers. This column utilizes the lookback period entered in report prompts. The lookback period impacts the lengths of stay by excluding dates from the calculation that are prior to when HMIS sharing began. This means that if regional sharing in HMIS is new, then the "lookback" period will be small, but increase as time goes on.

Q	R	S
Assessment Status		
VI-SPDAT Date	Indv VI-SPDAT	Family VI-SPDAT
3/17/2020	7	
1/28/2020	14	
11/13/2018	9	
3/4/2020	5	
10/7/2019	10	

15. **VI-SPDAT Date:** Pulls from the project entry/interim. If this column is blank, the client has not yet had a VI-SPDAT entered into HMIS, or it is not visible.
16. **Indv VI-SPDAT:** Pulls from the project entry/interim. If this column is blank, the client has not yet had this VI-SPDAT assessment entered into HMIS, or it is not visible.
17. **Family VI-SPDAT:** Pulls from the project entry/interim. If this column is blank, the client has not yet had this VI-SPDAT assessment entered into HMIS, or it is not visible.

	T	U	V	W	X	Y	Z	AA
1	Case Conferencing							
2	Most Recent Living Situation Update	Most Recent Current Living Situation	Most Recent CE Housing Event Date	Most Recent CE Housing Event	Referred to Provider	Housing Move-in Date	CE Exit Date	CE Project Exit Destination
3	3/17/2020	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHHY-funded Host Home shelter (HUD)						
4								
5	11/9/2020	Place not meant f	12/10/2020	Referral to RRH project resource opening	Happy RRH			
6								
7	9/16/2020	Staying or living in a friend's room, apartment or house (HUD)						
8	10/12/2020	Place not meant for habitation (HUD)						
9						11/26/2019		
10								

18. **Most Recent Living Situation Update:** Pulls from the most recent Current Living Situation for the client. All active clients must have a Living Situation Update at least once every 90 days. If this column is blank, then item has not been entered into HMIS or it is not visible.
19. **Most Recent Current Living Situation:** Pulls from the most recent Current Living Situation for the client. If this column is blank, then item has not been entered into HMIS or it is not visible.

Current Living Situation

Start Date *	09 / 21 / 2020
End Date	09 / 21 / 2020
Information Date	09 / 21 / 2020
Current Living Situation	Place not meant for habitation (HUD)
If "Other", Specify	<input type="text"/>
Living situation verified by	NC Balance of State Nei <input type="button" value="Lookup"/> <input type="button" value="Clear"/>

20. **Most Recent CE Housing Event Date:** Pulls from the most recent Coordinated Entry Event Start Date for the client. If this column is blank, then item has not been entered into HMIS or it is not visible.
21. **Most Recent CE Housing Event:** Pulls from the most recent Coordinated Entry Event for the client. This will only pull Referrals to potential housing solution like RRH, PSH, or other PH opening in the Coordinated Entry Event. If this column is blank, that item has not been entered into HMIS or it is not visible.
22. **Referred to Provider:** Pulls from the Coordinated Entry Event Location of Referral question. It lists the HMIS Provider the referral was sent to. If this column is blank, that item has not been entered into HMIS, or it is not visible.

Coordinated Entry Event

Start Date *	09 / 21 / 2020				
End Date	09 / 21 / 2020				
Date of Event *	09 / 21 / 2020				
Event *	Referral to RRH project resource opening				

If 'Event' answer was 'Problem Solving/Diversion/Rapid Resolution intervention or service result', please answer the following question:

Problem Solving/Diversion /Rapid Resolution intervention or service result - Client housed/re-housed in a safe alternative	-Select-	
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If 'Event' answer was 'Referral to post-placement/follow-up case management result', please answer the following question:

Referral to post-placement/follow-up case management result - Enrolled in Aftercare project	-Select-	
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If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

Location of Crisis Housing or Permanent Housing Referral	Greenville Housing Auth	<input type="button" value="Lookup"/>	<input type="button" value="Clear"/>	
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23. **Housing Move-in Date:** Pulls from the Housing Move-in Date on interim assessments. If this column is blank, that item has not been completed by the CE project.
24. **CE Exit Date:** Pulls from the CE Project Entry/Exit tab. If this column is blank, that exit has not been completed by the CE project.
25. **CE Project Exit Destination:** Pulls from the CE Project Exit form question. If this column is blank or missing, that item has not been completed by the CE project.

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Back@Home Variations for Running the By Name List Report:

The By-Name List report can be run a few different ways to include Back@Home data. Choose the one that best suites the community needs at the time or is most appropriate for use.

Most Recent Front Door Provider Column:

1. How to run the BNL report to include the Back@Home Triage project in the “most recent front door provider” column.
 - a. The **Provider Group** prompt should be changed to or also include the regional Coordinated Entry SSO + Back@Home Reporting Group.

Region 10 Coordinated Entry SSO + Back@Home Reporting Group
Region 11 Coordinated Entry SSO + Back@Home Reporting Group
Region 12 Coordinated Entry SSO + Back@Home Reporting Group

- b. All the remaining prompts should be entered as listed above in [running the By Name List report](#) section.

2. Pros and Cons to including the Back@Home Triage project only in the “most recent front door provider” column:

- a. Pros: All folks with a current Back@Home Triage project entries will pull into the report and be clearly marked as having an entry into the Triage project in the most recent front door provider column.

K	L	M	N
Homeless Provider Information			
CE Project? Y or N	Most Recent Front Door Provider	Most Recent Project Entry Date	Most Recent Project Exit Date
Yes	Back@Home - NC-503 Region 12 - Triage - State ESG CV(20275)	5/7/2021	
No	Back@Home - NC-503 Region 12 - Triage - State ESG CV(20275)	3/10/2021	
Yes	Back@Home - NC-503 Region 12 - Triage - State ESG CV(20275)	3/18/2021	

- b. Cons: If a household had an entry into another front door provider, after their Back@Home Triage project entry then that label would only pull in the most recent front door provider column. If you are looking just at Back@Home Triage households, you might miss some households. Due to the fact this column only pulls the most recent service provider, it is not guaranteed that clients in Triage will be identified here. And to see if a person is engaged with either regional project you will need to compare/use two columns (K&L) instead of just one column.

CE Project? Y or N Column:

1. How to run the BNL report to include the Back@Home Triage project in the “CE Project? Y or N” column.
 - a. The **CE Provider** prompt should be changed to or also include the regional Back@Home Triage project as well as the regional CE project.

Selected Values	
Name	
 NC Balance of State - Inner Banks (Region 12) Coordinated Entry Project(7582)	
 Back@Home - NC-503 Region 12 - Triage - State ESG CV(20275)	
Showing 1-2 of 2	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

- b. All the remaining prompts should be entered as listed above in [running the By Name List report](#) section.
2. Pros and Cons to including the Back@Home Triage project only in the “CE Project? Y or N” column:
 - a. Pros: All folks with a current Back@Home Triage project entries will pull into the report. Communities can easily see if households have an entry into a required regional project or not. This can easily identify Households with a No in the CE Project column that need discussion and CE Assessment services.

Homeless Provider Information	
CE Project? Y or N	Most Recent Front Door Provider
No	Washington Area Interchurch Shelter and Kitchen - Beaufort County - Emergency Shelter - ES
Yes	Greenville Community Shelters - Pitt County - Emergency Shelter - ES - State ESG(298)
Yes	Greenville Community Shelters - Pitt County - Emergency Shelter - ES - State ESG(298)
Yes	Greenville Community Shelters - Pitt County - Emergency Shelter - ES - State ESG(298)
No	Greenville Community Shelters - Pitt County - Emergency Shelter - ES - State ESG(298)
No	Greenville Housing Authority - Pitt County - Intake(6902)

- b. Cons: You cannot easily tell if the Yes refers to the regular CE provider project or the Back@Home Triage or both. If a household had an entry into the Back@Home Triage project but has already been connected to a RRH provider and exited, it may look as if they do not have an entry into one of the required regional projects.

Most Recent Front Door Provider and CE Project? Y or N Columns:

1. How to run the BNL report to include the Back@Home Triage project in the “most recent front door provider” column and the CE Project? Y or N Columns.
 - a. The **Provider Group** prompt should be changed to or also include the regional Coordinated Entry SSO + Back@Home Reporting Group.

- Region 10 Coordinated Entry SSO + Back@Home Reporting Group
- Region 11 Coordinated Entry SSO + Back@Home Reporting Group
- Region 12 Coordinated Entry SSO + Back@Home Reporting Group

b. The **CE Provider** prompt should be changed to or also include the regional Back@Home Triage project as well as the regional CE project.

c. All the remaining prompts should be entered as listed above in [running the By Name List report](#) section.

2. Pros and Cons to including the Back@Home Triage project in both the “most recent front door provider” column and the CE Project? Y or N column:

a. Pros: All folks with a current Back@Home Triage project entries will pull into the report and be clearly marked as having an entry into the Triage project in the most recent front door provider column. Communities can also easily see if households have an entry into a required regional project (CE or Back@Home) or if households need to be added.

CE Project? Y or N	Most Recent Front Door Provider	Most Recent Project Entry Date	Most Recent Project Exit Date
Yes	Greenville Community Shelters - Pitt County - Emergency Shelter	5/11/2021	
Yes		7/1/2019	
Yes	Back@Home - NC-503 Region 12 - Triage - State ESG CV(2027)	5/7/2021	
Yes	Back@Home - NC-503 Region 12 - Triage - State ESG CV(2027)	3/10/2021	
Yes	Back@Home - NC-503 Region 12 - Triage - State ESG CV(2027)	3/18/2021	
Yes	Back@Home - NC-503 Region 12 - Triage - State ESG CV(2027)	3/12/2021	
Yes	Back@Home - NC-503 Region 12 - Triage - State ESG CV(2027)	3/12/2021	5/11/2021
Yes	Greenville Community Shelters - Pitt County - Emergency Shelter	4/30/2021	5/20/2021

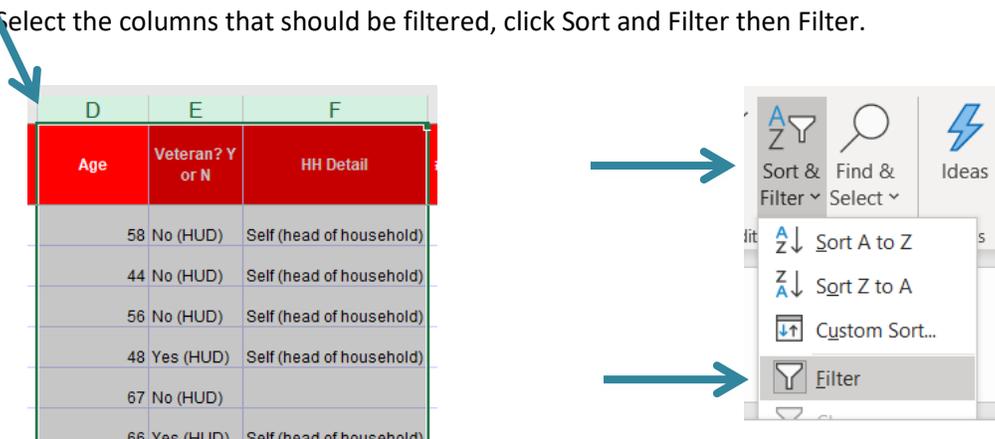
- b. Cons: Households will not be as easy to distinguish between regular CE or Back@Home. Filtering to Back@Home Triage for “Most Recent Front Door” will not catch folks with a more recent provider like shelter, street outreach, or transition housing projects. The total count when filtered to Triage will not equal the total waiting in in the Triage project for Back@Home services. If a household had an exit from Back@Home Triage and an entry into the Back@Home RRH but has not been housed yet, it may look as if they are missing an entry into the Back@Home Triage project.

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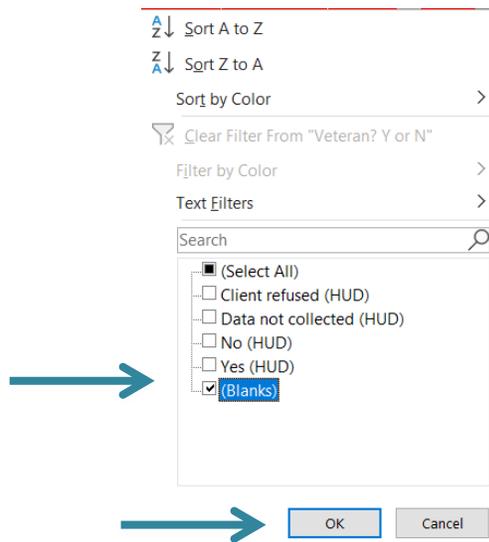
Reviewing the By Name List report for data quality checks:

Each column can be selected and filtered for blanks to check data quality or visibility issues.

1. Select the columns that should be filtered, click Sort and Filter then Filter.



2. A little box with an arrow will appear in the top of the column, click that box to select which items to filter for then click OK.



- Review rows that are blank for the selected data element. These people/household are either missing data or the CE project needs a visibility update. Please note that some people/households may filter out of the report due to their data being incomplete or missing in HMIS like relationship to head of household.

D	E	F
Age	Veteran? Y or N	HH Detail
40		Self (head of household)
45		Self (head of household)
34		Self (head of household)

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Reviewing the By Name List report for other information:

The By-Name List will be used for case conferencing. For specifics on how to sort, filter and review the list for case conferencing see the next sections of this guide.

- Filter the “CE Project? Y or N” column to No to view people/households missing an entry into the Coordinated Entry Project or the Back@Home Triage project (if used). Anyone with a VI-SPDAT assessment and/or length of stay of over 14 days needs an entry into the CE project or Triage.

CE Project? Y or N	Project Entry Date	Project Exit Date	Length of Stay (Days)	Length of Stay (Cumulative)
No	5/12/2016		1205	1205
No	5/13/2016		1204	1204
No	6/1/2016		1185	1185

- Filter the VI-SPDAT date column to view people/households missing a VI-SPDAT. If the cumulative length of stay is over 14 days, then administer the assessment and enter into HMIS or ensure connected to Back@Home.

Length of Stay (Days)	Length of Stay (Cumulative)	VI-SPDAT Date	Indv VI-SPDAT	Family VI-SPDAT
1205	1205			
1204	1204			
1185	1185			

- Filter the Current Living Situation to Place not meant for habitation to identify people living unsheltered the last time a community provider saw them. All clients should have a Current Living Situation updated at least every 90 days. Confirming CLS once a month can better support Documentation of Homelessness for permanent housing projects.

T	U	V	W	X
Case Conferencing				
Most Recent Living Situation Update	Most Recent Current Living Situation	Most Recent CE Housing Event Date	Most Recent CE Housing Event	Referred to Provider
11/9/2020	Place not meant for habitation	12/10/2020	Referral to RRH project resource opening	Happy RRH
10/12/2020	Place not meant for habitation (HUD)			
12/7/2020	Place not meant for habitation (HUD)			
9/24/2020	Place not meant for habitation (HUD)			

- Filter the Housing Move-in date column to view people/households that have been housed. If they have not re-entered the homeless system, then exit them from the Coordinated Entry Project.

V	W	Y
Housing Assessment Disposition	Date referred to a housing provider	Housing Move-in Date
Referred to rapid re-housing	1/22/2019	1/29/2019
Referred to permanent supportive housing	1/23/2019	3/20/2019
Referred to rapid re-housing	2/13/2019	2/28/2019

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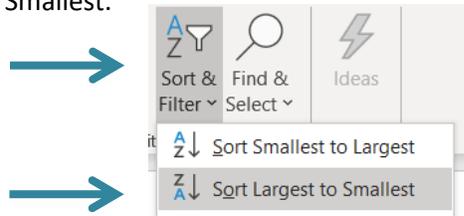
Sort and Filter By Name List Report for Long Stayers Not Yet Assessed

Every person/household that has been homeless for 14+ days without a VI-SPDAT assessment could lose a chance at a housing resource. Long Stayers that have not yet been assessed should be assessed as soon as possible. You can use the by-name list report to find who needs to be assessed.

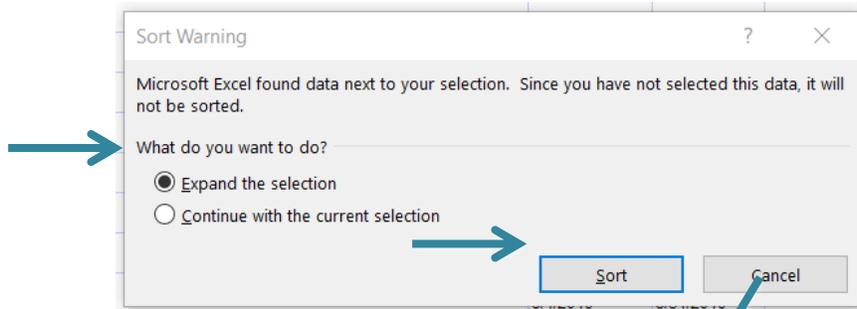
1. Select the Length of Stay (Cumulative) column.

O	P	Q
Length of Stay (Days)	Length of Stay (Cumulative)	VI-SPDAT Date
1205	1205	
1204	1204	
1185	1185	
117	989	
2	692	1/9/2019
5	513	7/26/2018

2. Click Sort and Filter and then Sort Largest to Smallest.



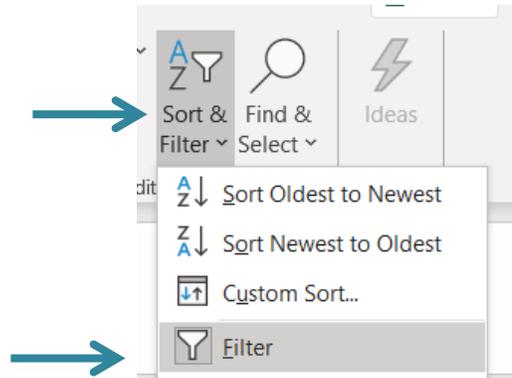
3. When the Sort Warning box pops up click Expand the selection and then click Sort. Longest Stayers should now be sorted to the top.



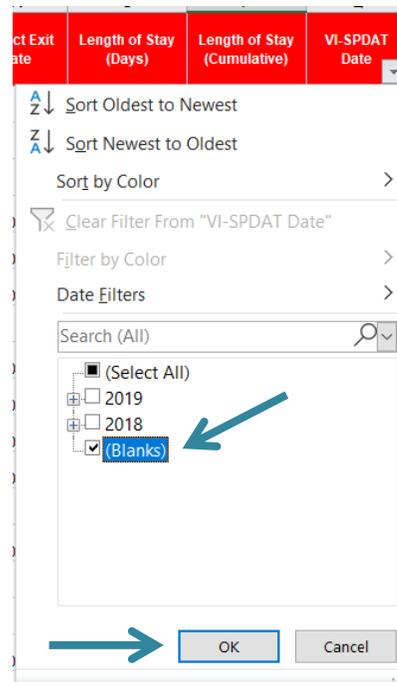
4. Select the VI-SPDAT Date Column.

P	Q	R
Length of Stay (Cumulative)	VI-SPDAT Date	Indv VI-SPDAT
1205		
1204		
1185		
989		

5. Click Sort and Filter and then click Filter



6. Click the black arrow at the top of the column. Unselect all except blanks and click Ok.



7. Longest stayers without an assessment in HMIS are now at the top. Discuss clients to get them assessed, connected to Back@Home or if assessment has been completed get it into HMIS. Create plan for assessment.

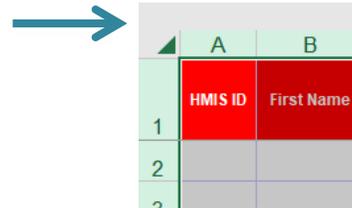
Project Entry Date	Project Exit Date	Length of Stay (Days)	Length of Stay (Cumulative)	VI-SPDAT Date	Indv VI-SPDAT	Family VI-SPDAT
5/12/2016		1205	1205			
5/13/2016		1204	1204			
6/1/2016		1185	1185			

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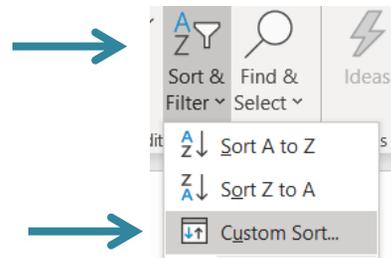
Ways to Sort and Filter for Prioritization

Housing referral prioritization is one of the most important jobs of the case conferencing meeting and can happen in a variety of ways. Those with a high VI-SPDAT score are prioritized first but other factors such as length of time homeless should be taken into account at the meeting.

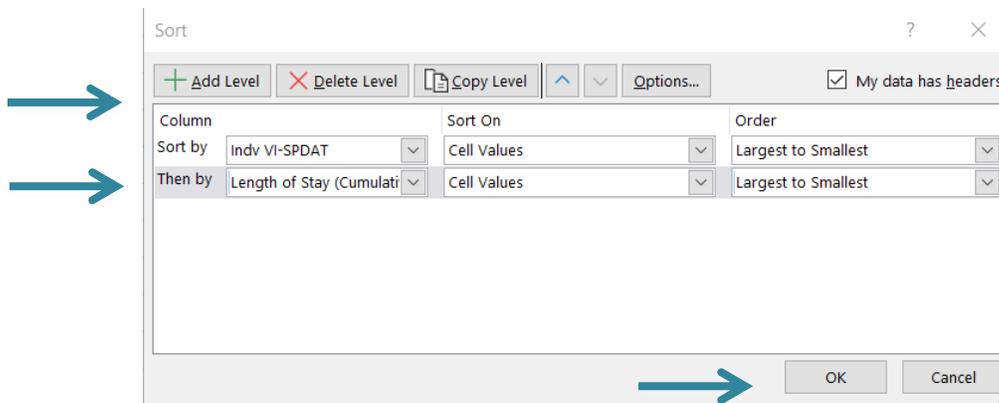
1. Click the triangle in the upper left corner of columns and rows to select the entire sheet.



2. Click Sort & Filter and then Custom Sort.



3. Sort VI-SPDAT column by Largest to Smallest. Then click Add Level to sort Length of Stay (Cumulative) by Largest to Smallest and click OK.



4. Highest VI-SPDAT score with longest time homeless is now at the top and can be reviewed for appropriate referrals.

Length of Stay (Days)	Length of Stay (Cumulative)	VI-SPDAT Date	Indv VI-SPDAT
25	25	8/5/2019	15
14	32	9/21/2018	14
217	217	1/25/2019	13
326	326	10/8/2018	12
65	65	6/26/2019	12
346	13	9/18/2018	12

Other uses of the by-name list report in case conferencing

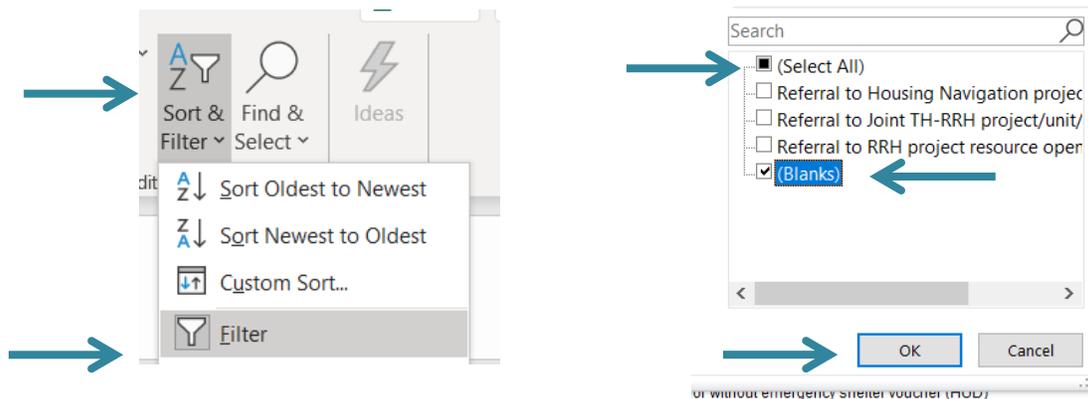
The By-Name List report tracks the progress of people through the Coordinated Entry system. It also highlights needed resources for sub-populations such as people/household who are chronically homeless, have disabilities, or are Veterans.

To track client's progress in CE, filter on CE Housing Event

1. Select Most Recent CE Housing Event column.

V	W	X
Case Conferencing		
Most Recent CE Housing Event Date	Most Recent CE Housing Event	Referred to Provider

2. Click Sort & Filter and then Filter. Click arrow in column to unselect everything except blanks then click OK.



3. Clients that do not have any CE events are now the only clients visible.

Case Conferencing		
Most Recent CE Housing Event Date	Most Recent CE Housing Event	Referred to Provider

- The same process can be used to filter on the other CE events. Then households can be discussed to ensure they have appropriate support in finding housing. The date they were referred can be checked as well to ensure they have not been searching for housing for a very long time.

Most Recent CE Housing Event Dat	Most Recent CE Housing Event
te 3/10/2021	Referral to RRH project resource opening
te 3/18/2021	Referral to RRH project resource opening
in 9/28/2020	Referral to Housing Navigation project or serv

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Filter for Veteran status

- Filter to Veterans by Selecting Veteran column, clicking Sort & Filter and then Filter. Click arrow in column to unselect no and blanks then click OK.

D	E	F
Age	Veteran? Y or N	HH Detail
58	No (HUD)	
	Yes (HUD)	
	No (HUD)	
58	No (HUD)	Self (head of household)

The 'Sort & Filter' menu is open, showing options: Sort A to Z, Sort Z to A, Sort by Color, Clear Filter From "Veteran? Y or N", Filter by Color, Text Filters, Search, (Select All), Client refused (HUD), Data not collected (HUD), No (HUD), Yes (HUD) (checked), and (Blanks). The 'Filter' option is selected.

- Sort VI-SPDAT column to highest score by selecting VI-SPDAT columns, clicking Sort & Filter and then Sort Largest to Smallest. Select Expand Selection and Sort.

Q	R	S
VI-SPDAT Date	Indv VI-SPDAT	Family VI-SPDAT
8/8/2018	4	
4/1/2019	8	

The 'Sort & Filter' menu is open, showing options: Sort Smallest to Largest and Sort Largest to Smallest (checked).

- Veterans with the highest VI-SPDAT score are now sorted to the top.

Length of Stay (Cumulative)	VI-SPDAT Date	Indv VI-SPDAT
142	8/20/2019	10
303	4/1/2019	8
98	7/31/2019	8
182	5/8/2019	7
125	5/25/2019	7

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Filter for chronic homelessness

- Filter to Chronically Homeless by selecting Is Client Chronically Homeless? column, clicking Sort & Filter and then Filter. Click arrow in column to unselect no and blanks then click OK.

G	H	I
# in Household	Is Client Chronically Homeless? Y or N	Disability? Y or N
1	Yes	Yes (HUD)

- Sort VI-SPDAT column to highest score by selecting VI-SPDAT columns, clicking Sort & Filter and then Sort Largest to Smallest. Select Expand Selection and Sort.

Q	R	S
VI-SPDAT Date	Indv VI-SPDAT	Family VI-SPDAT
8/8/2018	4	
4/1/2019	8	

3. Chronically Homeless individuals with the highest VI-SPDAT score are now sorted to the top and can be reviewed for available Chronic specific resources.

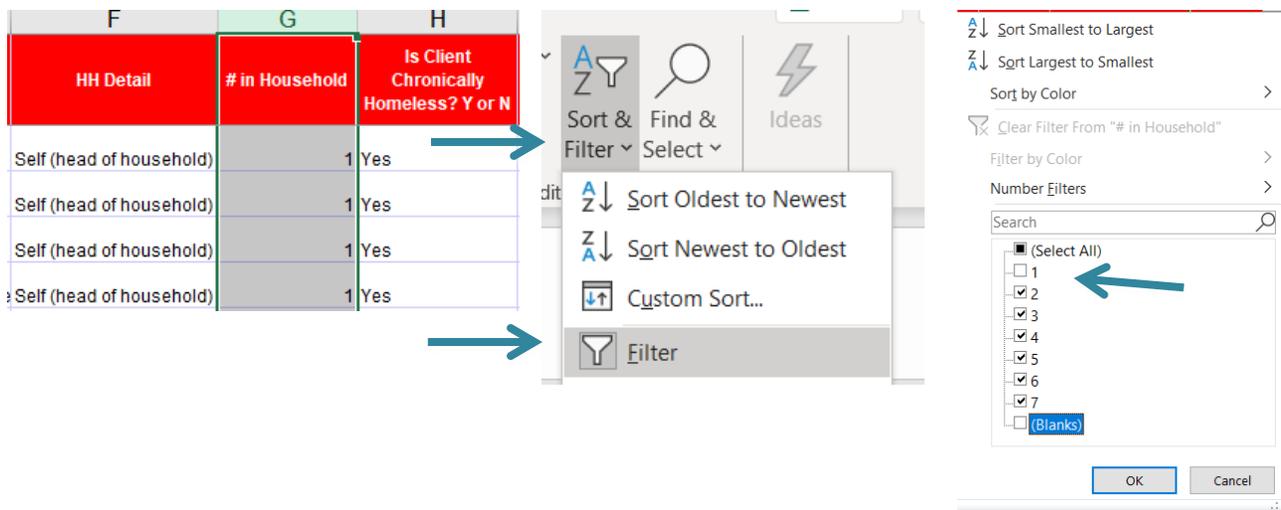


P	Q	R
Length of Stay (Cumulative)	VI-SPDAT Date	Indv VI-SPDAT
25	8/5/2019	15
32	9/21/2018	14
217	1/25/2019	13
326	10/8/2018	12

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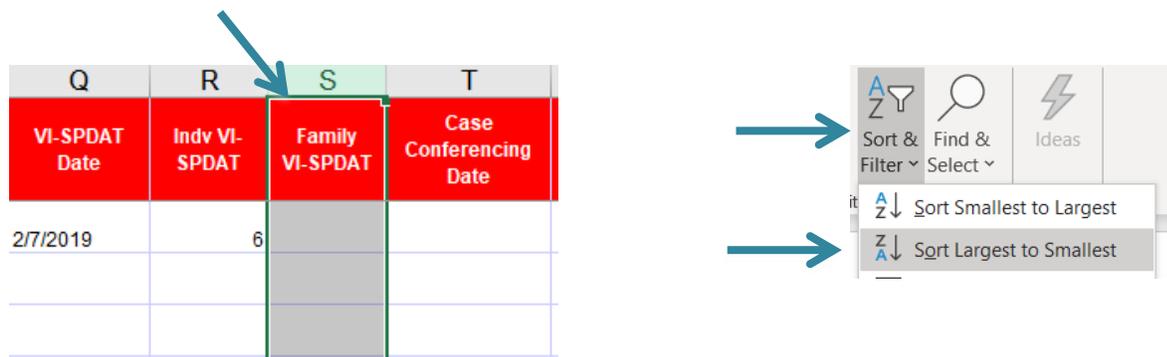
Filter for families

1. Filter to families only by Selecting # in Household column, clicking Sort & Filter and then Filter. Click arrow in column to unselect 1 and blanks then click OK.



F	G	H
HH Detail	# in Household	Is Client Chronically Homeless? Y or N
Self (head of household)	1	Yes
Self (head of household)	1	Yes
Self (head of household)	1	Yes
Self (head of household)	1	Yes

2. Sort VI-SPDAT column to highest score by selecting the Family VI-SPDAT columns, clicking Sort & Filter and then Sort Largest to Smallest. Select Expand Selection and Sort.



Q	R	S	T
VI-SPDAT Date	Indv VI-SPDAT	Family VI-SPDAT	Case Conferencing Date
2/7/2019	6		

- Families with the highest VI-SPDAT score are now sorted to the top and can be reviewed for available Family specific resources.

	Q	R	S
	VI-SPDAT Date	Indv VI-SPDAT	Family VI-SPDAT
→	3/1/2019		17
	2/25/2019		14
	4/8/2019		13
	7/30/2019		12

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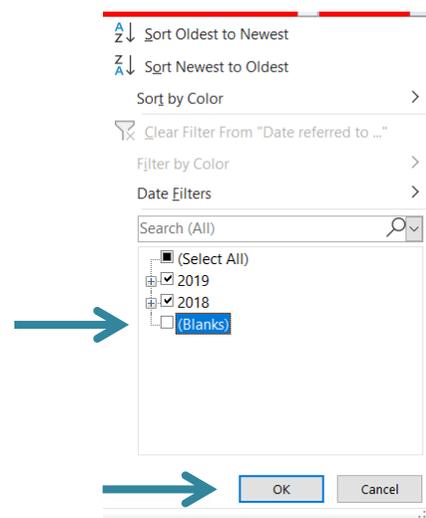
Sort and Filter By Name List Report for Referral Follow-ups

Updates should be provided on clients that have already been referred to a housing provider to see if they are housed yet or need additional supports.

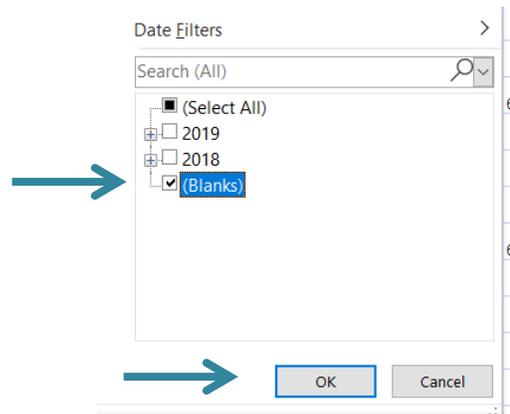
- Select all columns and click Sort & Filter then click Filter

U	V	W	X	Y	Z	AA
Client Status	Housing Assessment Disposition	Date referred to a housing provider	Referred to Provider	Housing Move-in Date	Date removed from By-Name List	Reason removed from By-Name List
Waiting for housin	Referred to permanent supportive housing	8/7/2019				
Waiting for housin	Referred to permanent supportive housing	2/13/2019		3/4/2019	6/28/2019	Housed for 90 days o

- Click arrow in Most Recent CE Housing Event Date column to unselect blanks then click OK.



- Click arrow in Housing Move-in Date column to unselect all dates but leave blanks then click OK.



- All clients that have been referred to a provider but not yet housed are now shown and can be reviewed for updates and next steps.

Most Recent CE Housing Event	Referred to Provider	Housing Move-in Date
Referral to RRH project resource opening	Trillium NC 503 Region 12 Back Home RRH State ESG CV (20276)	
Referral to RRH project resource opening	Trillium NC 503 Region 12 Back Home RRH State ESG CV (20276)	
Referral to Housing Navigation project or serv	Bowman Systems LLC (0)	

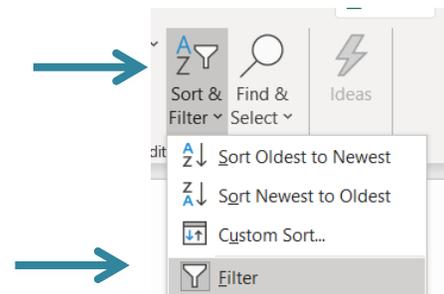
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Sort and Filter By Name List Report to Review clients not yet referred

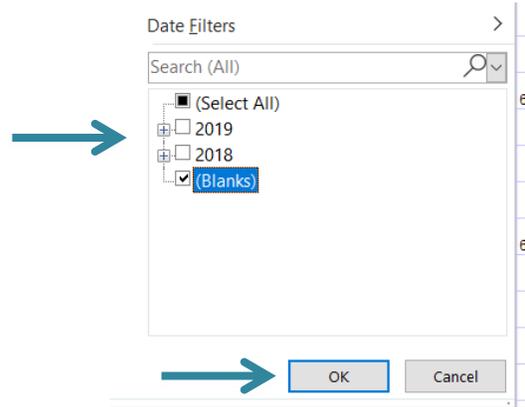
The By Name List report can be sorted and filtered to find and address clients that have not yet been referred to a housing provider.

- Select all columns and click Sort & Filter then click Filter

U	V	W	X	Y	Z	AA
Client Status	Housing Assessment Disposition	Date referred to a housing provider	Referred to Provider	Housing Move-in Date	Date removed from By-Name List	Reason removed from By-Name List
Waiting for housin	Referred to permanent supportive housing	8/7/2019				
Waiting for housin	Referred to permanent supportive housing	2/13/2019		3/4/2019	6/28/2019	Housed for 90 days o



2. Click arrow in Most Recent CE Housing Event date to unselect all dates but leave blanks and then click OK.



4. All clients that have not yet been referred to a housing provider are now shown and can be reviewed for updates and next steps.

Most Recent CE Housing Event Date	Most Recent CE Housing Event	Referred to Provider

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