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.

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

4. Click Schedule Report
5. 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.

a. **EDA Provider**: ALWAYS used. Select the CE or P&D Project.
b. **Enter Effective date**: This is the same as your End Date, often the same date that you are running the report.
c. **Provider Group**: ALWAYS used. Find and select your regional coordinated entry group.
d. **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.
e. **Report End Date**: This is the same as your Effective Date, often the same date that you are running the report
f. **Enter CE Provider(s)**: Find and select your CE project.
g. **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.

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

a. **Name**: Enter a name that will distinguish it from other reports that are the same type.
c. **Users Inbox**: Who’s ART inbox should this report go to? Skip this step if inapplicable.
d. **Interval**: Select Once.
e. **Start Date:** When should the report start running? This is NOT the same as reporting dates.

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. 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.
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.
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 entry.
6. **# in Household:** Total number of people in the household.
7. **Is Client Chronically homeless? Y or N:** Taken from the Coordinated Entry form chronic homeless yes or no question. If this column is blank that item has not been completed by the CE project.
8. **Disability? Y or N:** Taken from the project entry if this column is blank that items has not been completed or is not visible.

### Homeless Provider Information

<table>
<thead>
<tr>
<th>NC County of Service</th>
<th>CES Project? Y or N</th>
<th>Most Recent Provider</th>
<th>Most Recent Project Entry Date</th>
<th>Most Recent Project Exit Date</th>
<th>Length of Stay (Days)</th>
<th>Length of Stay (Cumulative)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wilson</td>
<td>Yes</td>
<td>3/17/2020</td>
<td></td>
<td></td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Wilson</td>
<td>Yes</td>
<td>1/28/2020</td>
<td></td>
<td></td>
<td>73</td>
<td></td>
</tr>
<tr>
<td>Wilson</td>
<td>Yes</td>
<td>Men's Shelter - ES - Private</td>
<td>3/12/2020</td>
<td>3/13/2020</td>
<td>1</td>
<td>45</td>
</tr>
<tr>
<td>Yes</td>
<td>10/7/2019</td>
<td></td>
<td></td>
<td></td>
<td>185</td>
<td></td>
</tr>
<tr>
<td>Wilson</td>
<td>Yes</td>
<td>4/25/2019</td>
<td></td>
<td></td>
<td>351</td>
<td>23</td>
</tr>
<tr>
<td>No</td>
<td>Street Outreach - SO - Private</td>
<td>12/12/2019</td>
<td>120</td>
<td>120</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 when the report was run.

11. **Current 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.

<table>
<thead>
<tr>
<th>Q</th>
<th>R</th>
<th>S</th>
</tr>
</thead>
<tbody>
<tr>
<td>VI-SPDAT Date</td>
<td>Indv VI-SPDAT</td>
<td>Family VI-SPDAT</td>
</tr>
<tr>
<td>3/17/2020</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>1/28/2020</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>11/13/2018</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>3/4/2020</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>10/7/2019</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

15. **VI-SPDAT Date:** Pulls from the project entry/interim, if this column is blank the client has not yet has 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 has 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 has this VI-SPDAT assessment entered into HMIS or it is not visible.
18. **Case Conferencing Date:** Pulls from the Coordinated Entry form question. If this column is blank that item has not been completed by the CE project.

19. **Client Status:** Pulls from the Coordinated Entry form question. If this column is blank that item has not been completed by the CE project.

20. **Housing Assessment Disposition:** Pulls from the Coordinated Entry form question. If this column is blank that item has not been completed by the CE project.

21. **Date referred to a housing provider:** Pulls from the Coordinated Entry form question. If this column is blank that item has not been completed by the CE project.

22. **Referred to Provider:** Pulls from the Coordinated Entry form question. If this column is blank that item has not been completed by the CE project.
23. **Housing Move-in Date**: Pulls from the Coordinated Entry form question. If this column is blank that item has not been completed by the CE project.

24. **Date removed from By-Name List**: Pulls from the Coordinated Entry form question. If this column is blank that item has not been completed by the CE project.

25. **Reason removed from By-Name List**: Pulls from the Coordinated Entry form question. If this column is blank that item has not been completed by the CE project.

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.
3. 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.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>Veteran? Y or N</td>
<td>HH Detail</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Self (head of household)</td>
</tr>
<tr>
<td>45</td>
<td></td>
<td>Self (head of household)</td>
</tr>
<tr>
<td>34</td>
<td></td>
<td>Self (head of household)</td>
</tr>
</tbody>
</table>

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.

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

2. 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.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Length of Stay (Days)</td>
<td>Length of Stay (Cumulative)</td>
<td>VI-SPDAT Date</td>
</tr>
<tr>
<td>1205</td>
<td>1205</td>
<td></td>
</tr>
<tr>
<td>1204</td>
<td>1204</td>
<td></td>
</tr>
<tr>
<td>1185</td>
<td>1185</td>
<td></td>
</tr>
</tbody>
</table>
3. Filter the Housing Move-in date column to view people/households that have been housed for 90+ days. If they have not re-entered the homeless system, then exit them from the Coordinated Entry Project.

<table>
<thead>
<tr>
<th>Housing Assessment Disposition</th>
<th>Date referred to a housing provider</th>
<th>Housing Move-in Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referred to rapid re-housing</td>
<td>1/22/2019</td>
<td>1/29/2019</td>
</tr>
<tr>
<td>Referred to permanent supportive housing</td>
<td>1/23/2019</td>
<td>3/20/2019</td>
</tr>
<tr>
<td>Referred to rapid re-housing</td>
<td>2/13/2019</td>
<td>2/28/2019</td>
</tr>
</tbody>
</table>

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.

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.

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 or if assessment has been completed get it into HMIS. Create plan for assessment.

<table>
<thead>
<tr>
<th>Project Entry Date</th>
<th>Project Exit Date</th>
<th>Length of Stay (Days)</th>
<th>Length of Stay (Cumulative)</th>
<th>VI-SPDAT Date</th>
<th>Indv VI-SPDAT</th>
<th>Family VI-SPDAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/12/2016</td>
<td></td>
<td>1205</td>
<td>1205</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5/13/2016</td>
<td></td>
<td>1204</td>
<td>1204</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5/1/2016</td>
<td></td>
<td>1165</td>
<td>1165</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

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 Client Status
1. Select Client Status column.

![Table of Client Statuses]

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

![Filter Popup]

3. Clients that are designated as needing case conferencing are now the only clients visible.

![Filtered Table]

4. The same process can be used to filter on the other Client Statuses.
   a. **Clients that are designated as missing documents** can be discussed to ensure they receive assistance in getting needed documents.
   b. **Clients that are designated as cannot be located** can be discussed to ensure outreach attempts are made to find the client before removing from the by name list.
   c. **Clients that are designated as in housing search** can be discussed to ensure they have appropriate support in finding housing. The date they were referred to a housing provider can be checked as well to ensure they haven’t been searching for housing for a very long time.
Filter for Veteran status

1. 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.

2. 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.

3. Veterans with the highest VI-SPDAT score are now sorted to the top.
Filter for chronic homelessness

1. 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.

2. 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.

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.
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.

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.

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

1. Select all columns and click Sort & Filter then click Filter

<table>
<thead>
<tr>
<th>Client Status</th>
<th>Housing Assessment Disposition</th>
<th>Date referred to a housing provider</th>
<th>Referred to Provider</th>
<th>Housing Move-in Date</th>
<th>Date removed from By-Name List</th>
<th>Reason removed from By-Name List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waiting for housing</td>
<td>Referred to permanent supportive housing</td>
<td>8/7/2019</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Click arrow in Date referred to a housing provider column to unselect blanks then click OK.

3. Click arrow in Housing Move-in Date column to unselect all dates but leave blanks then click OK.
4. 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.

<table>
<thead>
<tr>
<th>Housing Assessment Disposition</th>
<th>Date referred to a housing provider</th>
<th>Referred to Provider</th>
<th>Housing Move in Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referred to permanent supportive housing</td>
<td>8/7/2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Referred to permanent supportive housing</td>
<td>6/26/2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Referred to permanent supportive housing</td>
<td>3/13/2019</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 been case conferences but not yet referred to a housing provider.

1. Select all columns and click Sort & Filter then click Filter
2. Click arrow in Case Conferencing date column to unselect blanks then click OK.

3. Click arrow in Date referred to a housing provider column to unselect all dates but leave blanks and then click OK.

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