

# BoS HMIS Tools for PIT Count

## Table of Contents

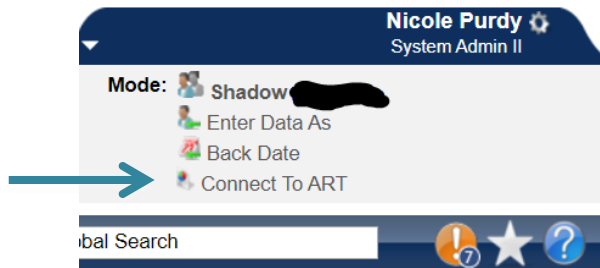
Abbreviated By Name List Guide .....	1
Running the By Name List Report: .....	1
Report Columns on the By-Name List Report: .....	4
Reviewing the By Name List report for data quality checks: .....	8
Reviewing the By Name List report for other information: .....	10
Contact Information report guide.....	10
Running the 2021 PIT Contact Information Report: .....	10
Columns on the 2021 PIT Contact Information Report .....	12
Reviewing the 2021 PIT Contact Information for data quality checks: .....	13

## Abbreviated By Name List Guide

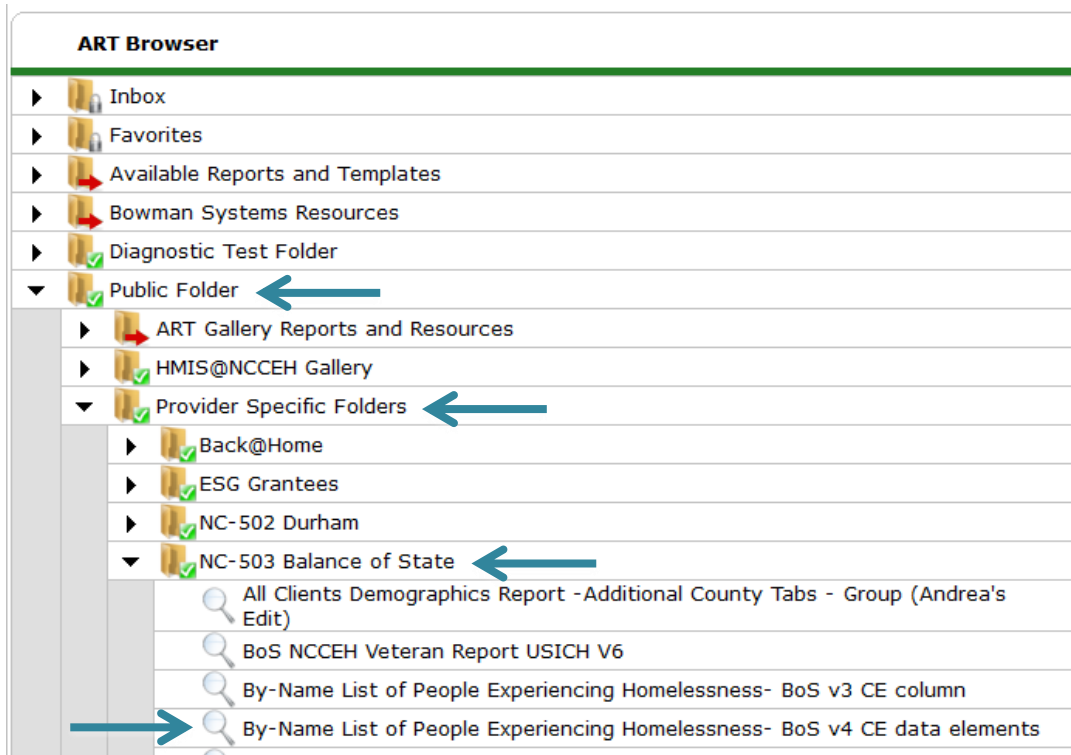
### Running the By Name List Report:

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.

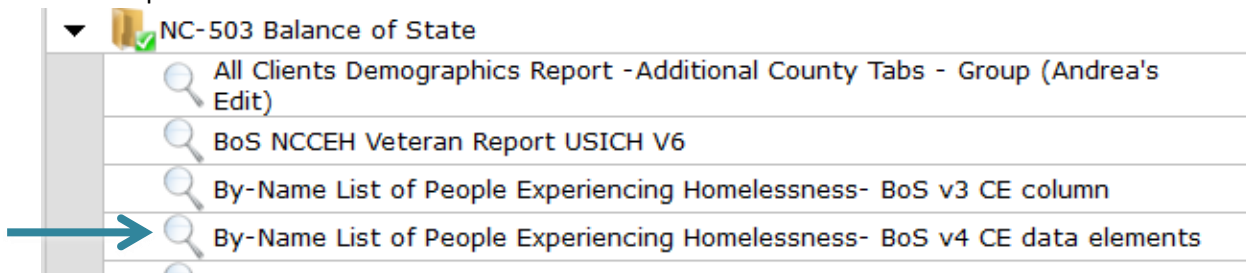
1. As with all ART reports, you need to click Connect to ART to access and run the report.



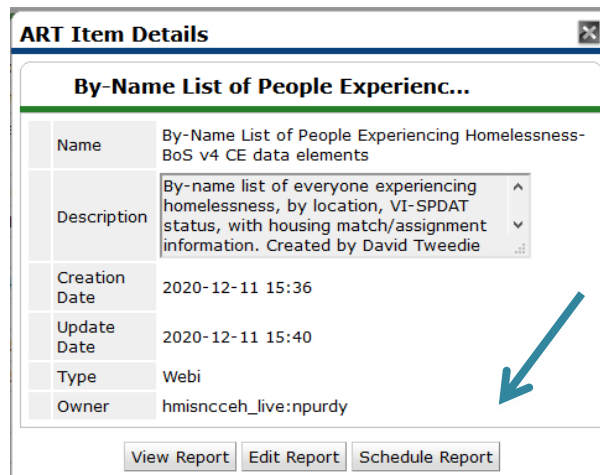
2. Navigate to Public Folder then click triangle to open the next menu. Click the triangle next to Provider Specific Folders to open the next menu. Click the triangle next to NC-503 Balance of State to open the next menu. Then locate the By-Name List report.



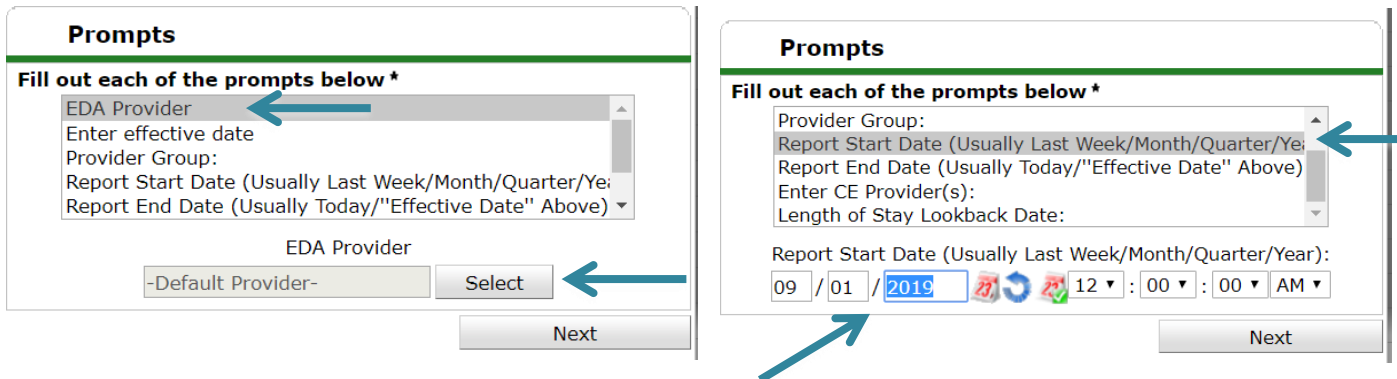
3. Click the magnifying glass next to the By-Name List of People Experiencing Homelessness 4 report.



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.

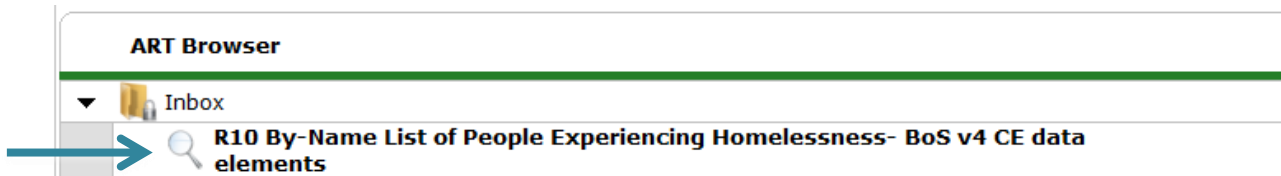


- a. **EDA Provider:** ALWAYS used. Select the CE or P&D Project.
- b. **Enter Effective date:** This is the same as your End Date, often the same date that you are running the report.
- c. **Provider Group:** ALWAYS used. Find and select your regional coordinated entry group.
  1. Find and select your 2021 PIT Count group, to see all possible clients from your regular regional coordinated entry group, Back@Home, or not yet moved into other permanent housing.
- 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.

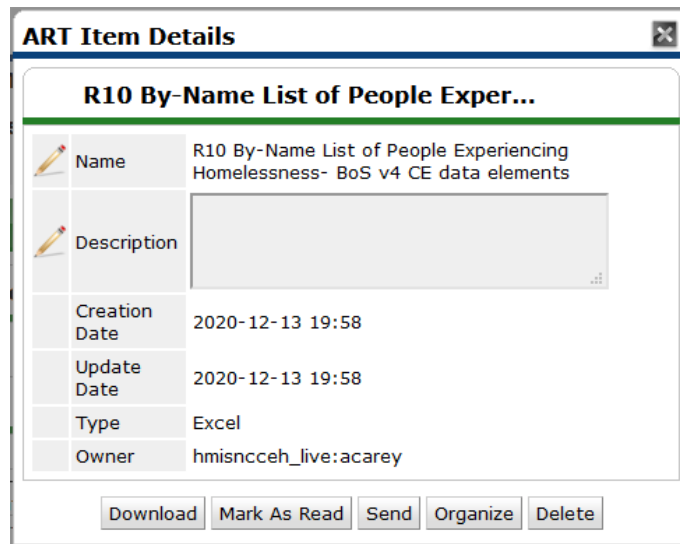
6. After all prompts are completed click Next. The schedule report box will pop up.

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

- b. **Report Format:** Select Excel.
  - 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.



[Back to Table of Contents](#)

### 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.
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						
NC County of Service	CES Project? Y or N	Most Recent Provider	Most Recent Project Entry Date	Most Recent Project Exit Date	Length of Stay (Days)	Length of Stay (Cumulative)
Wilson	Yes		3/17/2020		24	
Wilson	Yes		1/28/2020		73	
Wilson	Yes	Men's Shelter - ES - Private	3/12/2020	3/13/2020	1	45
Wayne	No	Homeless Shelter - ES - Private	3/4/2020		37	37
Wilson	No	Men's Shelter - ES - Private	3/4/2020	3/31/2020	27	27
	Yes		10/7/2019		186	
Wilson	Yes		4/25/2019		351	23
	No	Street Outreach - SO - Private	12/12/2019		120	120

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.

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 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.

	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 RHY-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 Current Living Situation of the client's most recent HMIS provider. After Case Conferencing or a meeting to provide services, the Current Living Situation should be updated. All active clients must have a Living Situation Update at least once every 90 days. If this column is blank that item has not been entered into HMIS.
19. **Most Recent Current Living Situation:** Pulls from the Current Living Situation of the client's most recent HMIS provider. If this column is blank that item has not been entered into HMIS.

**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	Lookup	Clear		

20. **Most Recent CE Housing Event Date:** Pulls from the Coordinated Entry Event question of the client's most recent HMIS provider. If this column is blank that item has not been completed by the CE project.
21. **Most Recent CE Housing Event:** Pulls from the Coordinated Entry Event question of the client's most recent HMIS provider. This will only pull Referrals to RRH, PSH, or other PH opening in the Coordinated Entry Event. If this column is blank that item has not been entered.
22. **Referred to Provider:** Pulls from the Coordinated Entry Event question. It lists the HMIS Provider the referral was sent to. If this column is blank that item has not been completed by the CE project.

### Coordinated Entry Event

<b>Start Date *</b>	09 / 21 / 2020				
<b>End Date</b>	09 / 21 / 2020				
<b>Date of Event *</b>	09 / 21 / 2020				
<b>Event *</b>	Referral to RRH project resource opening <span style="float: right;"></span>				

**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-	
--	----------	--

**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-	
---	----------	--

**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"/>	
--	-------------------------	--	---------------------------------------	--------------------------------------	--

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. **CE Exit Date:** Pulls from the CE Project Entry/Exit tab. If this column is blank that item 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.

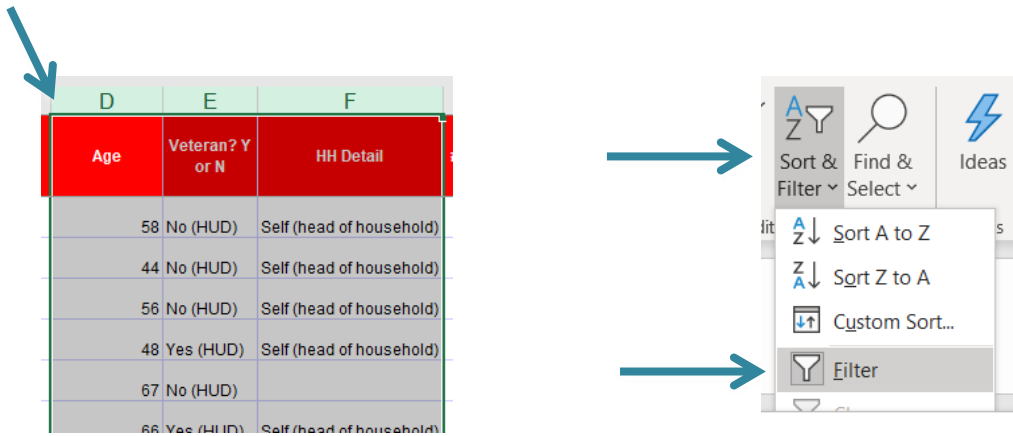
[Back to Table of Contents](#)

Reviewing the By Name List report for data quality checks:

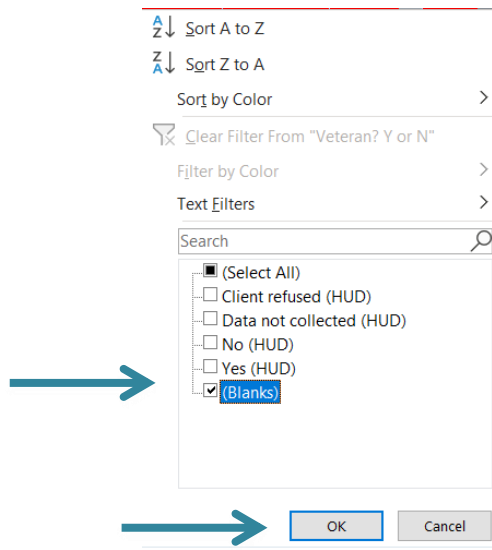
Each column can be selected and filtered for blanks to check data quality or visibility issues.

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.

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

[Back to Table of Contents](#)

## 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 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 once every 90 days.

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 (HUD)	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)			

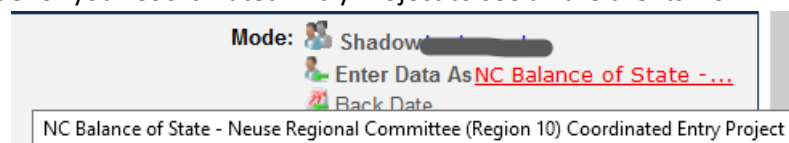
[Back to Table of Contents](#)

## Contact Information report guide

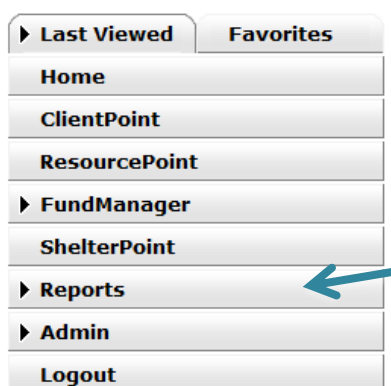
### Running the 2021 PIT Contact Information Report:

The 2021 PIT Contact Information Report is a ReportWriter raw data pull that will be used to find out contact information saved in HMIS for particular clients from the BNL. Copy the unsheltered BNL client IDs one at a time to check if they have any contact information available in the ReportWriter “2021 PIT Contact Info Report”.

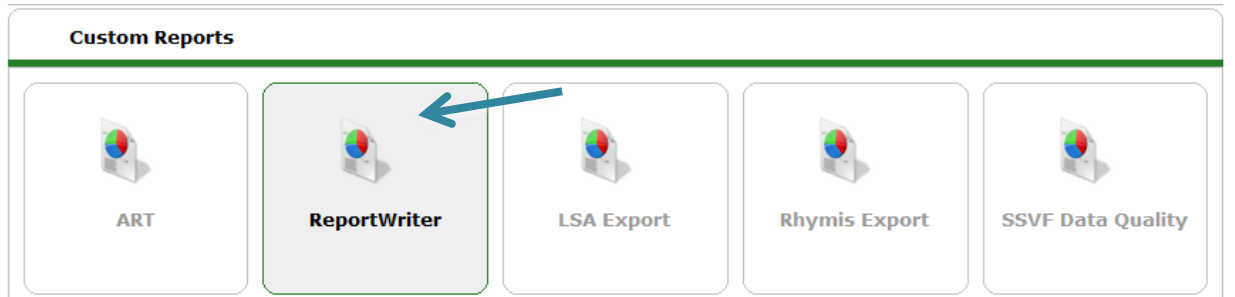
1. Use manual Enter Data As mode for your Coordinated Entry Project to see all the clients from the BNL.



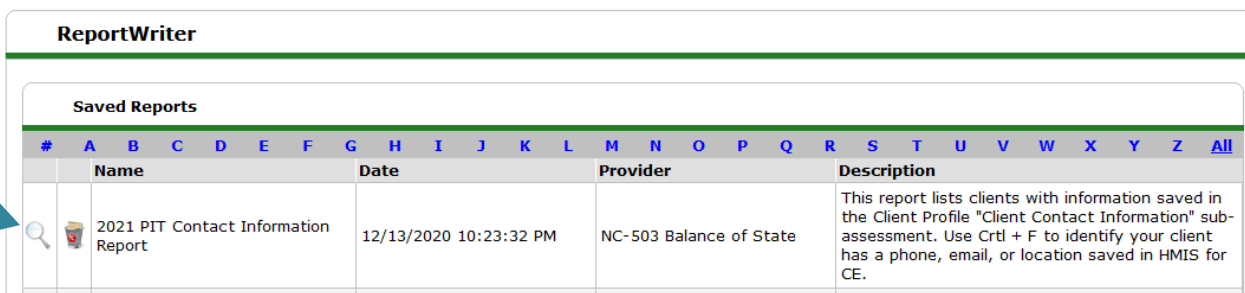
2. From your Home page in HMIS, click on the Reports menu to the left.



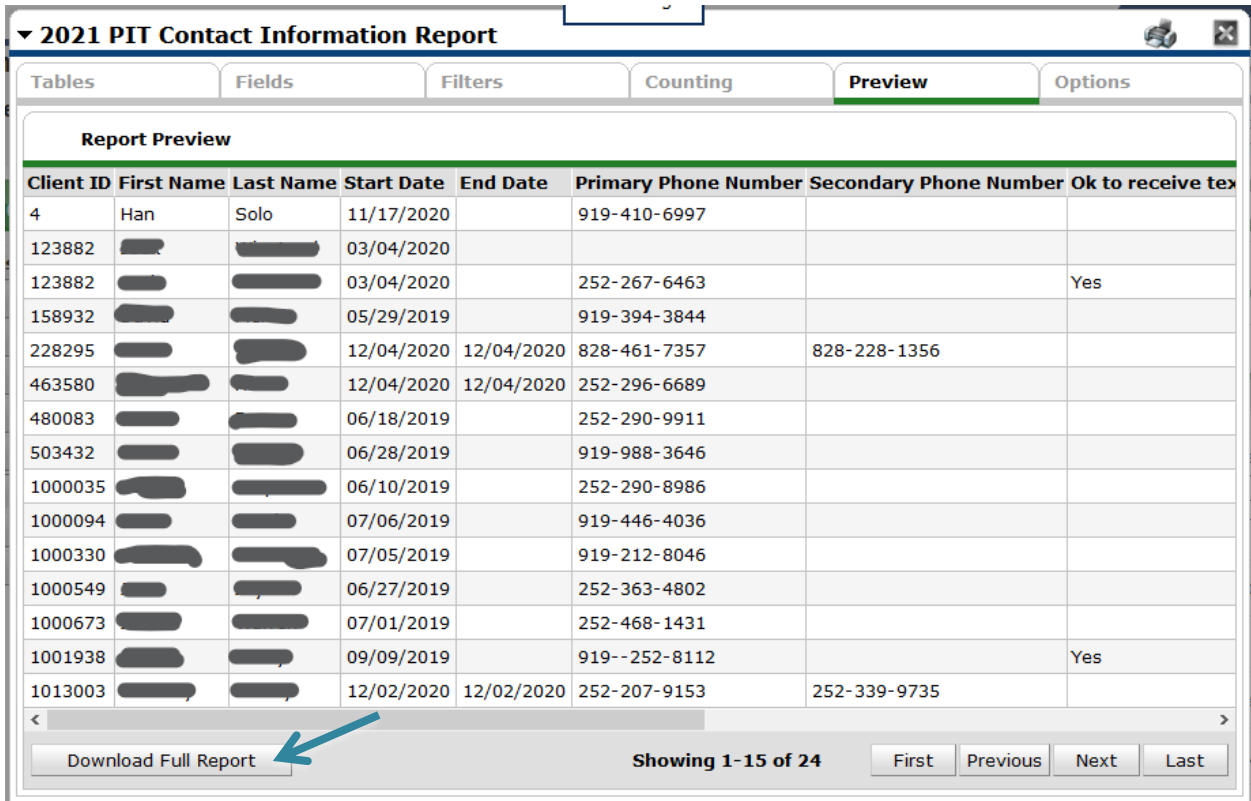
3. Then click on ReportWriter towards the bottom. (It may take a minute to load.)



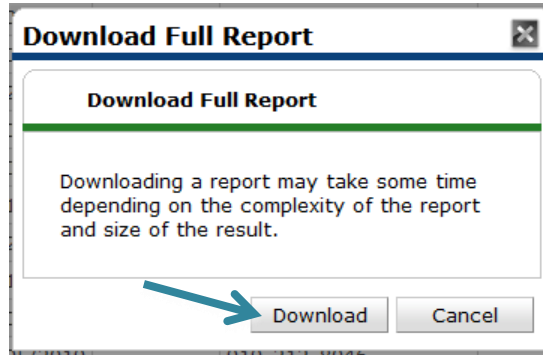
4. Find 2021 PIT Contact Information Report and click on the magnifying glass to run



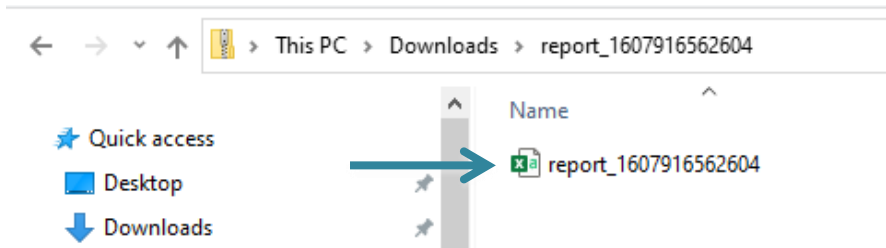
5. You will see a preview of the report. Click download to see the entire report.



6. Confirm your download. Click download once more.



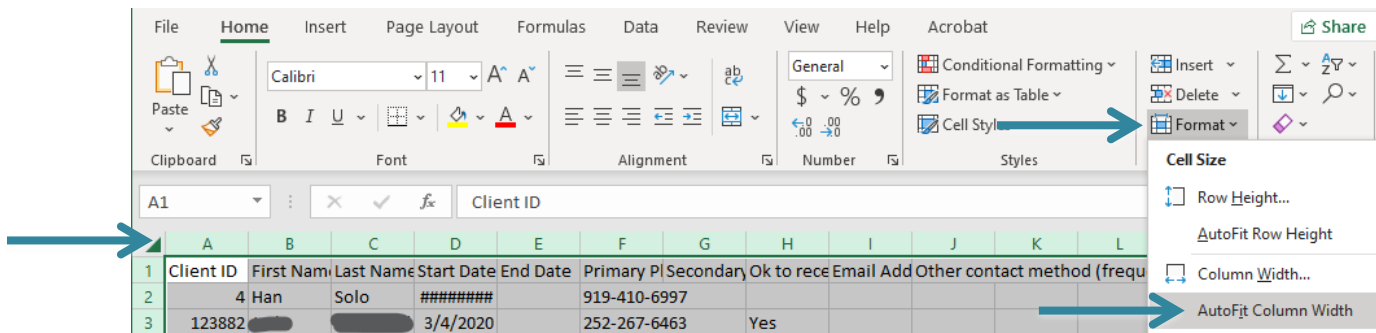
7. Open the zip folder that was downloaded and the CSV file within it. It may look like this in your downloads folder.



[Back to Table of Contents](#)

## Columns on the 2021 PIT Contact Information Report

**To see all of the columns:** Click the triangle between the A column and 1 row to select all data. On the Home tab, find the Format options, and select AutoFit Column Width.



	A	B	C	D	E
1	Client ID	First Name	Last Name	Start Date	End Date
2	4	Han	Solo	11/17/2020	
3	123882	[REDACTED]	[REDACTED]	3/4/2020	
4	123882	[REDACTED]	[REDACTED]	3/4/2020	
5	158932	[REDACTED]	[REDACTED]	5/29/2019	
6	228295	[REDACTED]	[REDACTED]	12/4/2020	12/4/2020
7	463580	[REDACTED]	[REDACTED]	12/4/2020	12/4/2020
8	480083	[REDACTED]	[REDACTED]	6/18/2019	

1. **Client ID:** HMIS ID for clients on the report.
2. **First and Last Name:** Taken from name fields on HMIS.
3. **Start Date:** Pulls the date this contact information was added to HMIS.
4. **End Date:** Pulls the date this contact information was no longer relevant. If a date is entered, the information is for historical reference.

F	G	H	I	J
Primary Phone Number	Secondary Phone Number	Ok to receive texts?	Email Address	Other contact method (frequent location)
919-410-6997				
252-267-6463		Yes	test@test.com	
				Corner of 3rd and Main St most mornings
919-394-3844				
828-461-7357	828-228-1356			
252-296-6689			[REDACTED]@gmail.com	
252-290-9911				
919-988-3646				
report_1607916562604				

5. **Primary Phone:** The best phone number to reach the client. If it is blank, this item was not entered into HMIS.
6. **Secondary Phone:** The second best phone number to reach the client. If it is blank, this item was not entered into HMIS.
7. **Ok to receive texts:** Pulls a Yes or No answer for the previous phone numbers. If it is blank, this item was not entered into HMIS.
8. **Email Address:** Pulls an email address for the client. If it is blank, this item was not entered into HMIS.
9. **Other contact method (frequent location):** If the previous methods do not work, this text box allows a physical location like a campsite or regular meal service provider where the client may be contacted. Or a place a message may be left. If it is blank, this item was not entered into HMIS.

[Back to Table of Contents](#)

Reviewing the 2021 PIT Contact Information for data quality checks:

This is a simple report. If a client pulls on the By Name List report and is not found on the 2021 PIT Contact Information Report, their contact information is not saved in HMIS. Use this to know which clients need more a more reliable method of verifying their living situation on January 27<sup>th</sup>, 2021.