



REGIONAL TASK FORCE
ON THE HOMELESS
"OUR COMMUNITY, OUR HOMELESS, OUR ISSUES"

October 2016

ABSTRACT

This is a short tutorial on how to enter information on Entry, Interim Review, and Exit into the 2016 Veteran's By Name List assessment in the Entry/Exit workflow. This is Appendix B of the document "By Name List Management Instructions."

Veteran's By-Name List

Effective October 5th, 2016, the San Diego Veteran By-Name List (BNL) will be managed entirely within the HMIS. HMIS users who are working with Veterans will enter additional Veteran information directly into an assessment in ServicePoint.

BNL Baseline Review

The 2016 Veteran's By Name List Assessment should be completed for every Veteran served by a homeless-dedicated service provider within the past year. For Veterans that have not been actively homeless within the past year, only "List Status" needs to be updated.

Continuous BNL Management

After the initial baseline review period, the 2016 Veteran's By Name List Assessment should be completed every time a client enters or exits a project, and at every interaction or intervention that results in new information via an Interim Review. In accordance with the HMIS and BNL Policies and Procedures, all data should be entered at point of service or within 3 business days from the interaction with the Veteran.

Veteran By-Name List Assessment Fields

1) **List Status** - The most recently identified status of the Veteran, per the below definitions:

- **Active – Unsheltered:** currently literally homeless and residing in a public or private place not designed for human habitation.
- **Active – ES/TH/SH:** currently literally homeless and residing in an emergency shelter, Safe Haven, or transitional housing (including VA-funded Grants and Per Diem (GDP) programs) OR in an institutional care facility, including a jail, substance abuse or mental health treatment facility, hospital, or other similar facility, for fewer than 90 days and who were in ES/TH/SH just prior to entering the institutional care facility.
- **Active – Unknown or Missing:** current whereabouts are unknown but client has been served by a program in the HMIS within the last 90 days.
- **Inactive – Not Permanently Housed:** currently no longer literally homeless; residing in other non-permanent housing situation, e.g., friends/family-temporary tenure, residential treatment, institutional care facility (jail, substance abuse or mental health treatment facility, hospital, domiciliary, etc.) that have resided there for more than 90 days.
- **Inactive – Permanently Housed:** currently no longer literally homeless; residing in permanent housing.
- **Inactive – Unknown or Missing:** current whereabouts are unknown; cannot be located by outreach staff after repeated attempts for 90 days or more.

2) **Was Veteran status confirmed?** - If unknown, please indicate "No" until you have further information and describe in "Notes and Additional information."

3) **Last known Location** - Last known location and/or the last known provider that the Veteran has contact with to assist with outreach and locating the Veteran. This field provides information to complement "Provider Name and Contact Information" in the BNL report from the HMIS, which is the provider associated with the client's *most recent project entry date* in the HMIS.


- If unsheltered, this is the estimated location of where the Veteran is known to reside (i.e., green tent under 24th street overpass in downtown)
- If sheltered, this is the name (or address in the case of a treatment facility) of the agency who last entered their information into the BNL.

- 4) **Permanent Housing Plan/Track** - This is the intervention that the Veteran has indicated s/he is interested in working towards or is already enrolled.
- 5) **Date Permanent Housing Plan Created** - Once the Veteran has been enrolled in a program and staff have created a housing plan for that Veteran, the date of the creation of the plan should be noted here.
- 6) **Is Veteran eligible for Supportive Services for Veteran Families (SSVF)?** - To be updated by the VA or SSVF. Indicate status/actions pending in "Notes and Additional information."
- 7) **Is Veteran eligible for Veterans Health Administration (VHA)?** - To be updated by the VA or SSVF: indicates whether or not the Veteran is eligible for healthcare at the VA.
- If you do not have specific information that their VHA eligibility has been confirmed by the VA, do not choose yes or no. Indicate status/actions pending in "Notes and Additional information."
- 8) **Physical Description of Veteran** - Indicate anything that will assist Outreach staff in identifying the Veteran in the community, especially for Veterans who are "street-sleeping" (i.e., Veteran always has a purple hat on).
- 9) **Did Veteran sign the HMIS Multiparty Authorization form?** - Indicates whether or not the Veteran has signed the *San Diego County HMIS Multiparty Authorization to Use and/or Disclose Information*
- 10) **Notes and Additional Information** - Do not include any Protected Health Information (PHI) in this section (i.e., diagnoses). Suggestions for notes section: additional client IDs, contact info, changes to data
- 11) **Permanent Housing Interventions** - Subsidy or other forms of rental assistance, with appropriate services and supports. Interventions can include HUD-VASH, SSVF and COC program-funded rapid rehousing (where rental assistance is included), COC program-funded permanent supportive housing, Housing Choice Voucher (HCV), or other form of permanent housing subsidy or rental assistance.
- I. **Date of Permanent Housing Intervention Offer (Start Date)***
 - II. **Type of PH Intervention Offered to Veteran***
 - Permanent Housing Intervention where the subsidy or rental assistance is immediately available at the time the offer is made, i.e. a Veteran can immediately be issued a voucher or subsidy and begin the housing search process (if the subsidy is not attached to a hard unit).
 - This section is to be used to demonstrate that an offer of a PH intervention has been made to any Veteran that has declined a PH intervention in the past. Veterans should be offered a PH intervention every 2 weeks, if possible, and documented in this section.
 - III. **Was offer accepted by Veteran?***
 - IV. **Date Accepted or Declined (End Date)***
 - Note: If a Veteran accepts, the staff person updating the BNL will need to edit other previous questions such as
 1. Permanent Housing Plan/Track
 2. Date Permanent Housing Plan Created

HMIS Data Entry

Client Entry

- 1) Get started.
 - a) Logon with your username and password.
 - b) Check the project you are logged on to. If it's correct, continue.
 - i) – OR – Click the EDA link to change to the correct project.
 - c) Set the Back Date to be the same as the date for which you are entering information.
- 2) To find the client
 - a) Click on *ClientPoint*
 - b) Enter the client's First and Last Name and SSN to search for him/her.
 - i) – OR – Search by client ID#.
 - c) Review the list of possible matches ServicePoint displays.
 - d) When you see your client, select him/her by clicking on the *name or pencil*
- 3) Client Entry
 - a) Click the *Entry/Exit* tab
 - b) Click *Add Entry/Exit*
 - i) Choose the appropriate Entry/Exit Type
 - c) Complete all assessments assigned to your project, per your workflow
 - d) Click on the *2016 Veteran By-Name List Assessment*



Select an Assessment

<input checked="" type="checkbox"/> 2016 HUD - PSDE - Income / Disability	<input checked="" type="checkbox"/> 2016 - HUD UDEs	<input checked="" type="checkbox"/> 2016 Veteran By-Name List Assessment
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- i) Complete all applicable fields for all veterans in the household
 - e) Click *Save & Exit* button when done.

Interim Review

- 1) Repeat Steps 1-2 as appropriate
- 2) Interim Review
 - a) Click on the '*Interim Review*' icon next to your correct project entry
 - b) Click *Add Interim Review*
 - c) Choose the appropriate Interim Review type
 - d) Click on the *2016 Veteran By-Name List Assessment*
 - i) Update any applicable fields for all veterans in the household
 - e) Click *Save & Exit* button when done.
 - f) Update any other assessments, per your workflow
 - g) Repeat as needed by creating a new Interim Review

Client Exit

- 1) Repeat Steps 1-2 as appropriate
- 2) To update information on the 2016 Veteran By-Name List Assessment upon Exit from your project
 - a) Click on the '*Exit*' pencil icon next to your correct project entry
 - b) Complete all fields for the Exit assessment
 - c) Update all assessments assigned to your project including the 2016 Veteran By-Name List assessment, if applicable.
 - d) Click *Save & Exit* button when done.