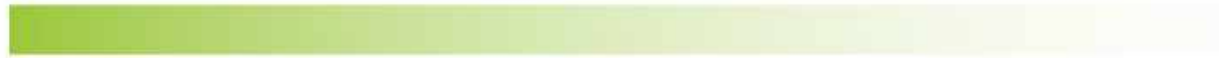




# Beyond Enrollments: Building Engagement-Based By-Name Lists



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**NHSDC SPRING 2022 CONFERENCE**  
MINNEAPOLIS, MN | MARCH 28-30, 2022

## WHY

I made an  
engagement-  
based  
by-name list

## WHAT

on earth  
that even  
means

## HOW

you can  
have one  
too!

## What is a by-name list?

Community Solutions defines a by-name list as “a comprehensive list of every person in a community experiencing homelessness, updated in real time.”





Not worth debunking



The PIT count is a snapshot

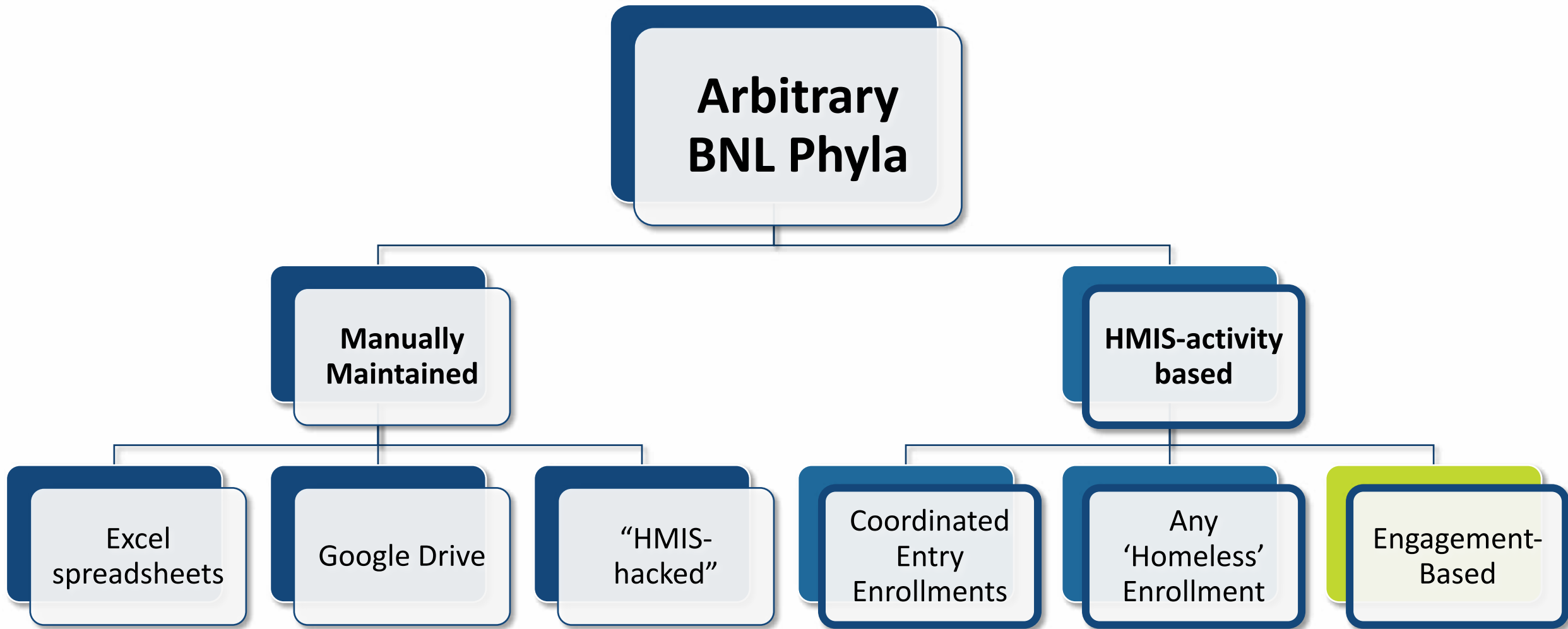


If it works for you!



This is where it gets interesting...





**Let's look at how each of  
the HMIS-activity based  
by-name lists work.**

# NHSDC Spring 2022 Conference



Nick

7/4/1950

Male

Black

Non-Hispanic/  
Latin(a(o)(x)



Natasha

12/3/1984

Female

White

Non-Hispanic/  
Latin(a(o)(x)

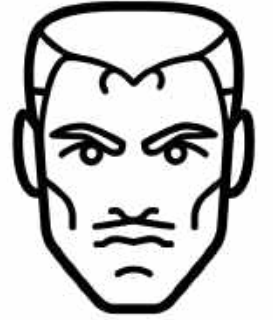


Stephen

11/18/1930

Male

Asian or Asian-  
American, White  
Client Refused



## Enrollments

Program	Entry Date	Exit Date
Street Outreach	10/9/21	
Transitional Housing	8/4/20	7/2/21

## Enrollments

Program	Entry Date	Exit Date
Coordinated Entry	4/21/21	
Street Outreach	1/17/21	

## Enrollments

Program	Entry Date	Exit Date
Emergency Shelter	3/23/22	3/27/22
Emergency Shelter	3/18/22	3/20/22

## Services

Program	Service	Date
Street Outreach	Case Mgmt.	3/21/22
Street Outreach	Mental Health	2/5/22
Street Outreach	Tent	12/8/21

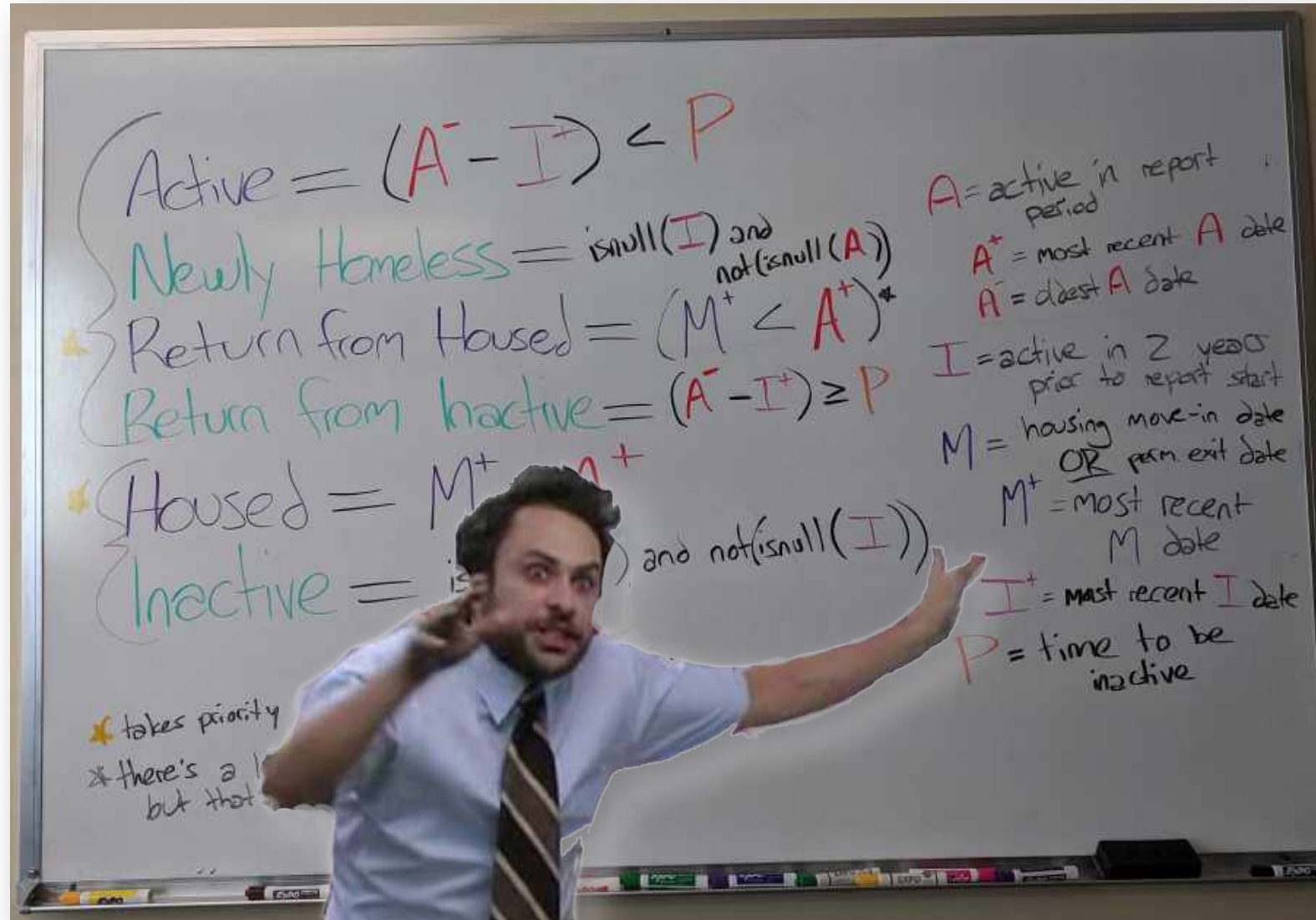
## Services

Program	Service	Date
Street Outreach	Basic Needs	5/9/21
Day Shelter	Shower	3/30/21
Street Outreach	Case Mgmt.	1/17/21

## Services

Program	Service	Date
Day Shelter	Laundry	3/25/22
Day Shelter	Laundry	3/19/22
Services Only	Transportation	3/18/22





Active =  $(A^- - I^+) < P$

Newly Homeless =  $\text{isnull}(I)$  and  $\text{not}(\text{isnull}(A))$

Return from Housed =  $(M^+ < A^+)^*$

Return from Inactive =  $(A^- - I^+) \geq P$

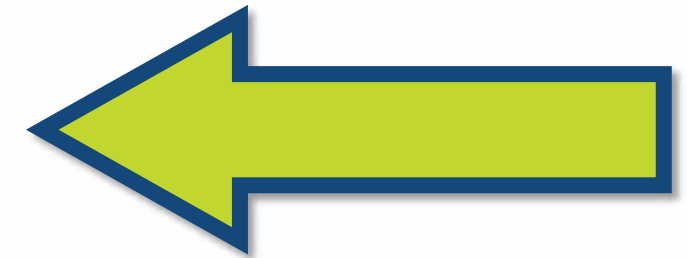
Housed =  $M^+ < A^+$

Inactive =  $\text{isnull}(A)$  and  $\text{not}(\text{isnull}(I))$

\* takes priority  
\* there's a 1 but that

$A$  = active in report period  
 $A^+$  = most recent  $A$  date  
 $A^-$  = oldest  $A$  date  
 $I$  = active in 2 years prior to report start  
 $M$  = housing move-in date OR perm exit date  
 $M^+$  = most recent  $M$  date  
 $I^+$  = most recent  $I$  date  
 $P$  = time to be inactive

Me, trying to explain  
the concept prior to  
implementation





**You keep talking about  
“homeless events” and  
“housed events” like  
that means something.**

**What are those?**

## Homeless Events

### Enrollment Dates

- Into shelter, safe haven, transitional housing, or street outreach
- Any from homeless situations

### Exit Dates

- From shelter, safe haven, transitional housing
- Any to literal homelessness

### Open Shelter Enrollments

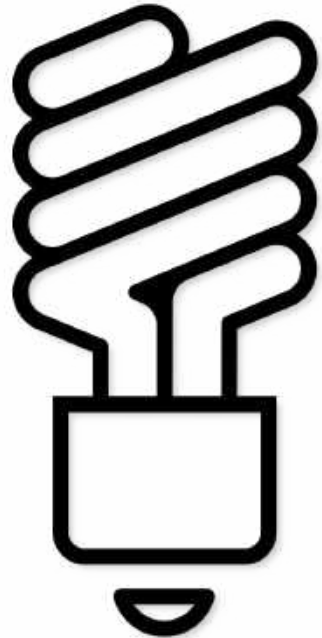
- These use today's date as the event date

### Current Living Situations

- Only those indicating homelessness

### Services

- Street outreach contact services
- OR any service from a homeless-specific program\*



**I get it! So housed  
events must be...**

## Housed Events

### Exit Dates

- Any to housed destinations

### Open RRH/PSH/OPH Enrollment

- Must have an existing (and valid!) move-in date
- These use today's date as the event date

### Current Living Situations

- Only those indicating the client is housed

### Services

- Rental assistance services
- Deposit assistance services

### Housing Move-In Dates

**Combine them in one table,  
and you can tell a story to get  
engagement-based statuses.**

**What are those?**

## Homeless Statuses

### Newly Homeless

- They only have homeless events, none older than 90 days

### Return from Housed

- At least one homeless event in the last 90 days that was immediately preceded by a housed event

### Return from Inactive

- Client has homeless events in the last 90 days and earlier, but has a gap between them of at least 90 days

### Active

- Homeless events in the last 90 days and earlier, not returning from housed



## Non-Homeless Statuses

### Housed

- Most recent event was a housed event

### Inactive

- Most recent event indicated homelessness, but it is more than 90 days old

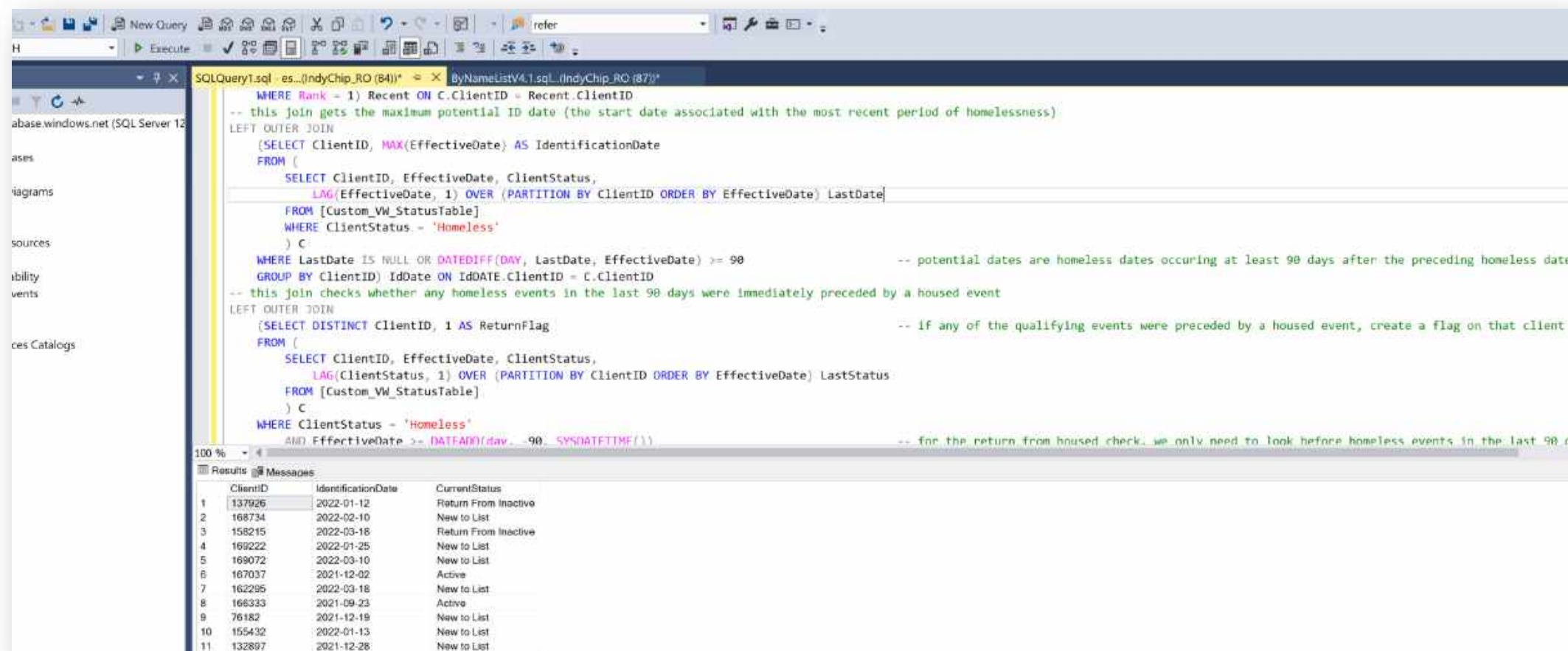
## Version I

Document

View

<

## Version II



The screenshot shows a SQL Server Enterprise Manager window with a query executed in SQLQuery1.sql. The query is a complex T-SQL statement that identifies homeless clients based on their status history. It uses window functions like LAG and MAX to track status changes over time. The results pane at the bottom displays a table with 11 rows of client data.

```

WHERE Rank = 1) Recent ON C.ClientID = Recent.ClientID
-- this join gets the maximum potential ID date (the start date associated with the most recent period of homelessness)
LEFT OUTER JOIN
(SELECT ClientID, MAX(EffectiveDate) AS IdentificationDate
FROM (
    SELECT ClientID, EffectiveDate, ClientStatus,
        LAG(EffectiveDate, 1) OVER (PARTITION BY ClientID ORDER BY EffectiveDate) LastDate
    FROM [Custom_VW_StatusTable]
    WHERE ClientStatus = 'Homeless'
) C
WHERE LastDate IS NULL OR DATEDIFF(DAY, LastDate, EffectiveDate) >= 90
GROUP BY ClientID) IdDate ON IdDate.ClientID = C.ClientID
-- this join checks whether any homeless events in the last 90 days were immediately preceded by a housed event
LEFT OUTER JOIN
(SELECT DISTINCT ClientID, 1 AS ReturnFlag
FROM (
    SELECT ClientID, EffectiveDate, ClientStatus,
        LAG(ClientStatus, 1) OVER (PARTITION BY ClientID ORDER BY EffectiveDate) LastStatus
    FROM [Custom_VW_StatusTable]
) C
WHERE ClientStatus = 'Homeless'
AND EffectiveDate >= DATETIME(day, -90, SYSDATETIME(1))
-- for the return from housed check, we only need to look before homeless events in the last 90 d

```

ClientID	IdentificationDate	CurrentStatus
137926	2022-01-12	Return From Inactive
168734	2022-02-10	New to List
158215	2022-03-18	Return From Inactive
169222	2022-01-25	New to List
169072	2022-03-10	New to List
167037	2021-12-02	Active
162296	2022-03-18	New to List
166333	2021-09-23	Active
76182	2021-12-19	New to List
155432	2022-01-13	New to List
132897	2021-12-28	New to List

# Version III

**Veteran By Name List**

Current Status: 
 

- Active
- New to List
- Return From Housed
- Return From Inactive
- Housed
- Inactive

In CES: -- SELECT --    In Shelter: Yes    Open Housing Referral: Yes

---

**Eligibility Search**

VA Healthcare Eligible: -- SELECT --    GPD Only: Yes    GPD Exception: -- SELECT --

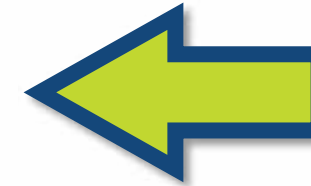
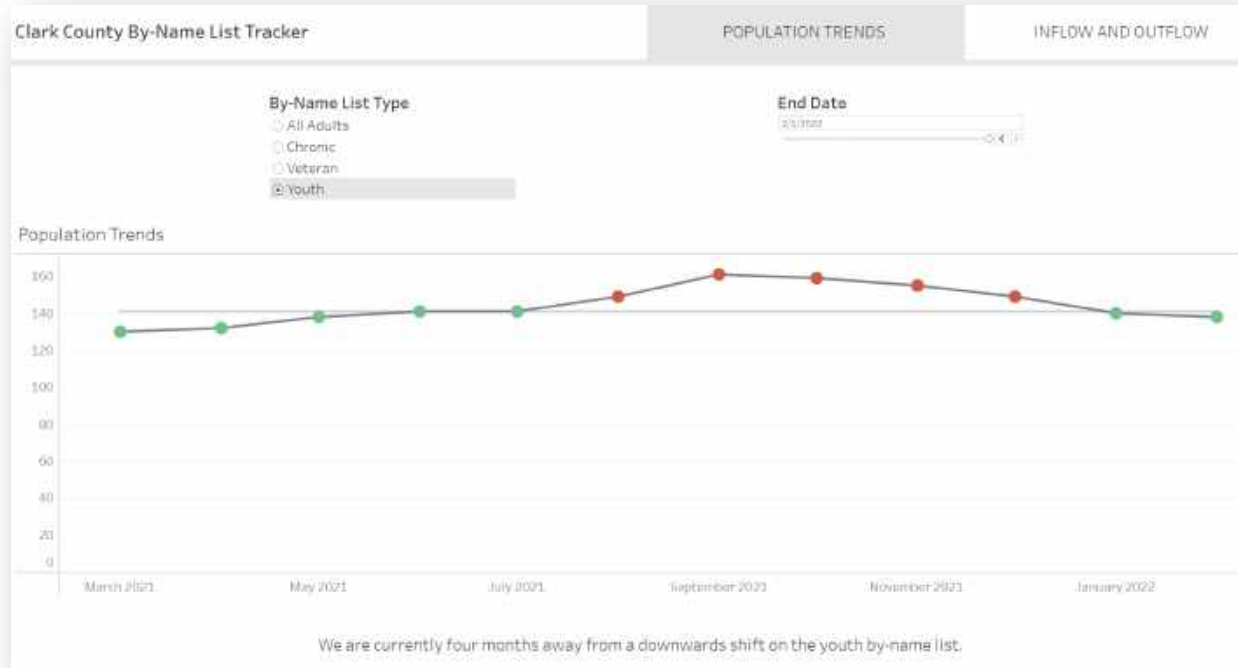
Needs VA Verification: -- SELECT --    Chronic Status: -- SELECT --

**Search**

1 result found.

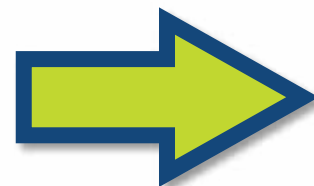
Client Name	Client ID	Date of Birth	SSN	Current Status	Current Enrollment/s	In CES	Identification Date	Contact Information	Most Recent Note
[Icon] [Name]	124235	[Date]	[SSN]	Active	[Enrollment Info]	✓	180-364 days	[Contact Info]	[Notes]

**What can I do  
with those statuses?**

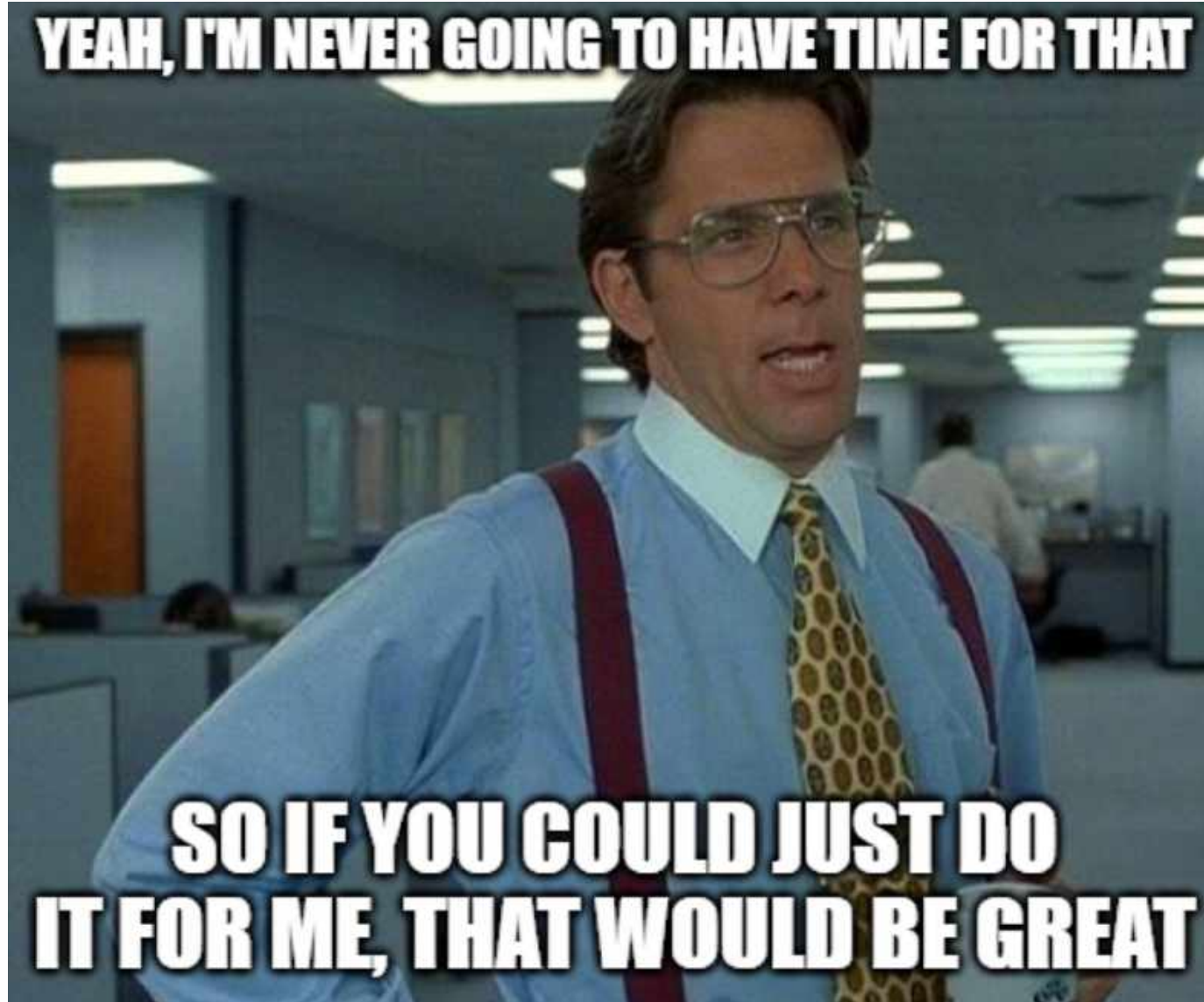


Total counts allow tracking over time

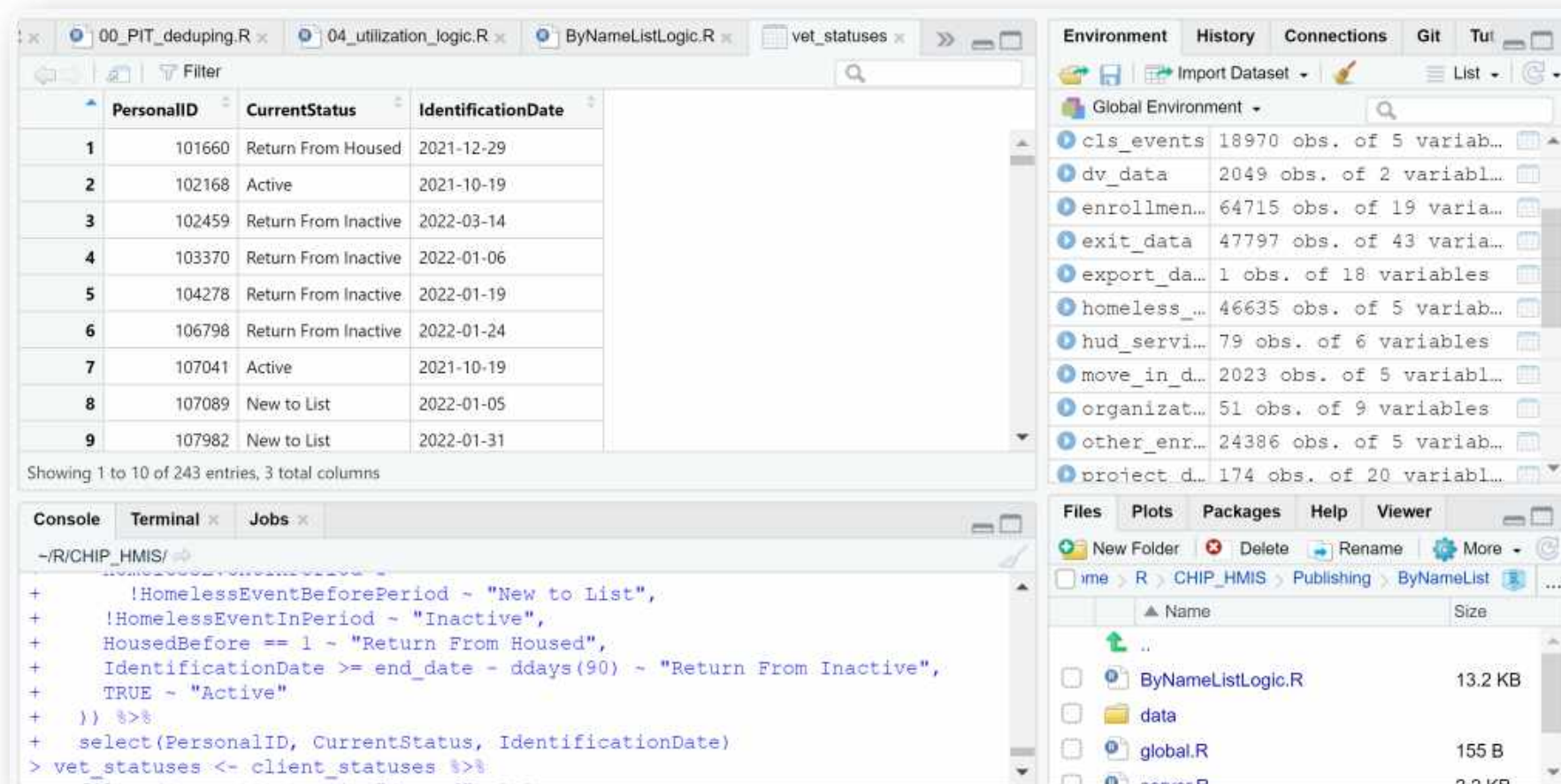
Client statuses make the logic easy to monitor







## Version IV



The screenshot displays the RStudio interface with the following components:

- Environment Pane:** Lists global objects including `cls_events` (18970 obs. of 5 variables), `dv_data` (2049 obs. of 2 variables), `enrollmen...` (64715 obs. of 19 variables), `exit_data` (47797 obs. of 43 variables), `export_da...` (1 obs. of 18 variables), `homeless_...` (46635 obs. of 5 variables), `hud_servi...` (79 obs. of 6 variables), `move_in_d...` (2023 obs. of 5 variables), `organizat...` (51 obs. of 9 variables), `other_enr...` (24386 obs. of 5 variables), and `project.d...` (174 obs. of 20 variables).
- Table View:** Displays a table with columns `PersonalID`, `CurrentStatus`, and `IdentificationDate`. The data shows various status transitions over time.
- Console:** Contains R code for filtering and selecting data based on status and date.

	PersonalID	CurrentStatus	IdentificationDate
1	101660	Return From Housed	2021-12-29
2	102168	Active	2021-10-19
3	102459	Return From Inactive	2022-03-14
4	103370	Return From Inactive	2022-01-06
5	104278	Return From Inactive	2022-01-19
6	106798	Return From Inactive	2022-01-24
7	107041	Active	2021-10-19
8	107089	New to List	2022-01-05
9	107982	New to List	2022-01-31

```
~/R/CHIP_HMIS/
+ !HomelessEventBeforePeriod ~ "New to List",
+ !HomelessEventInPeriod ~ "Inactive",
+ HousedBefore == 1 ~ "Return From Housed",
+ IdentificationDate >= end_date - ddays(90) ~ "Return From Inactive",
+ TRUE ~ "Active"
+ }) %>%
+ select(PersonalID, CurrentStatus, IdentificationDate)
> vet_statuses <- client_statuses %>%
```

## Version V

By-Name List

Tool Setup

Import HUD CSV

Optional Settings

By-Name Lists

Other Information

### HUD CSV Import

Import File Here

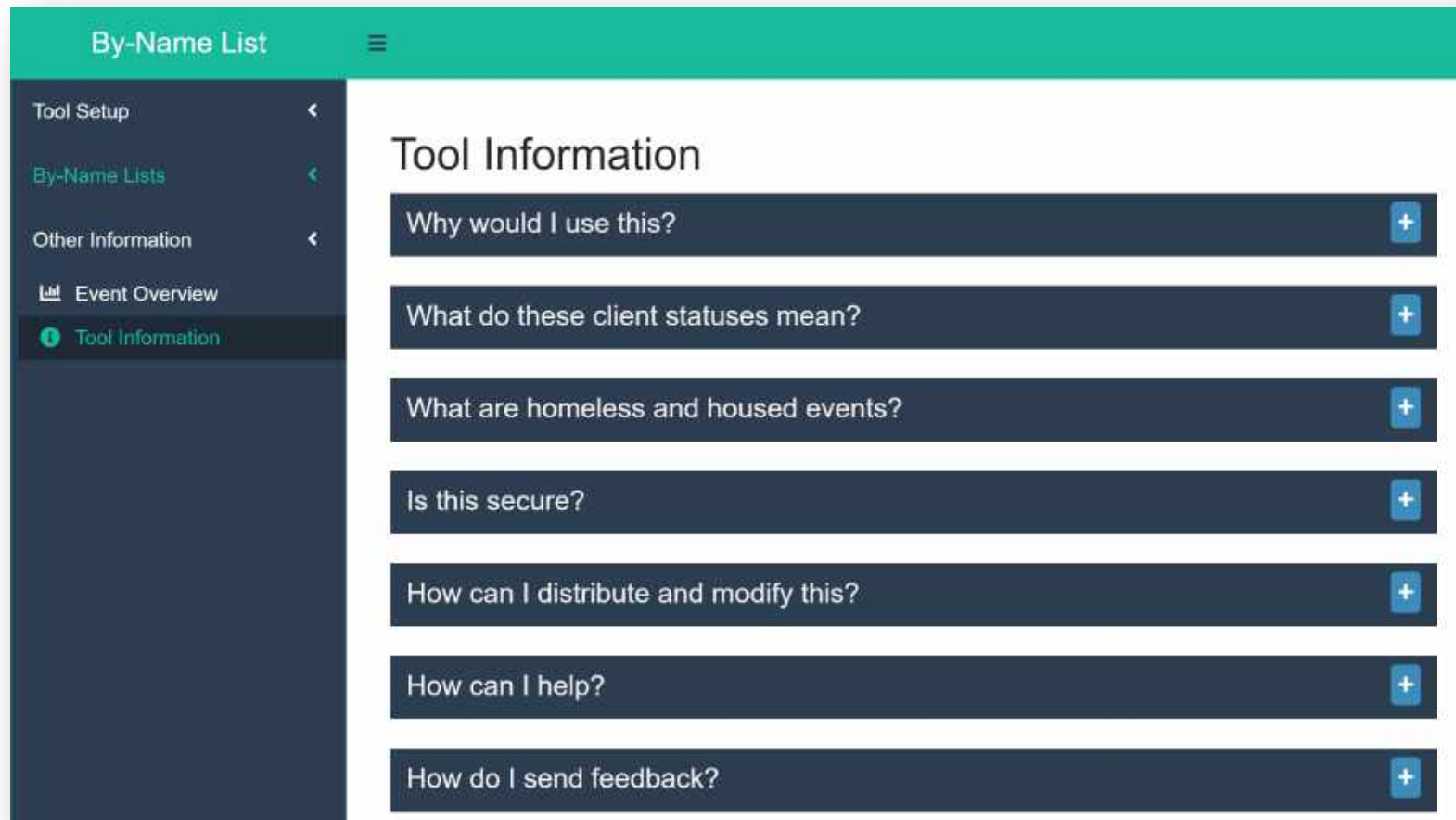
Browse...

HMIS CSV 2022 Export\_20220314174730\_TaskID\_141843.zip

Upload complete

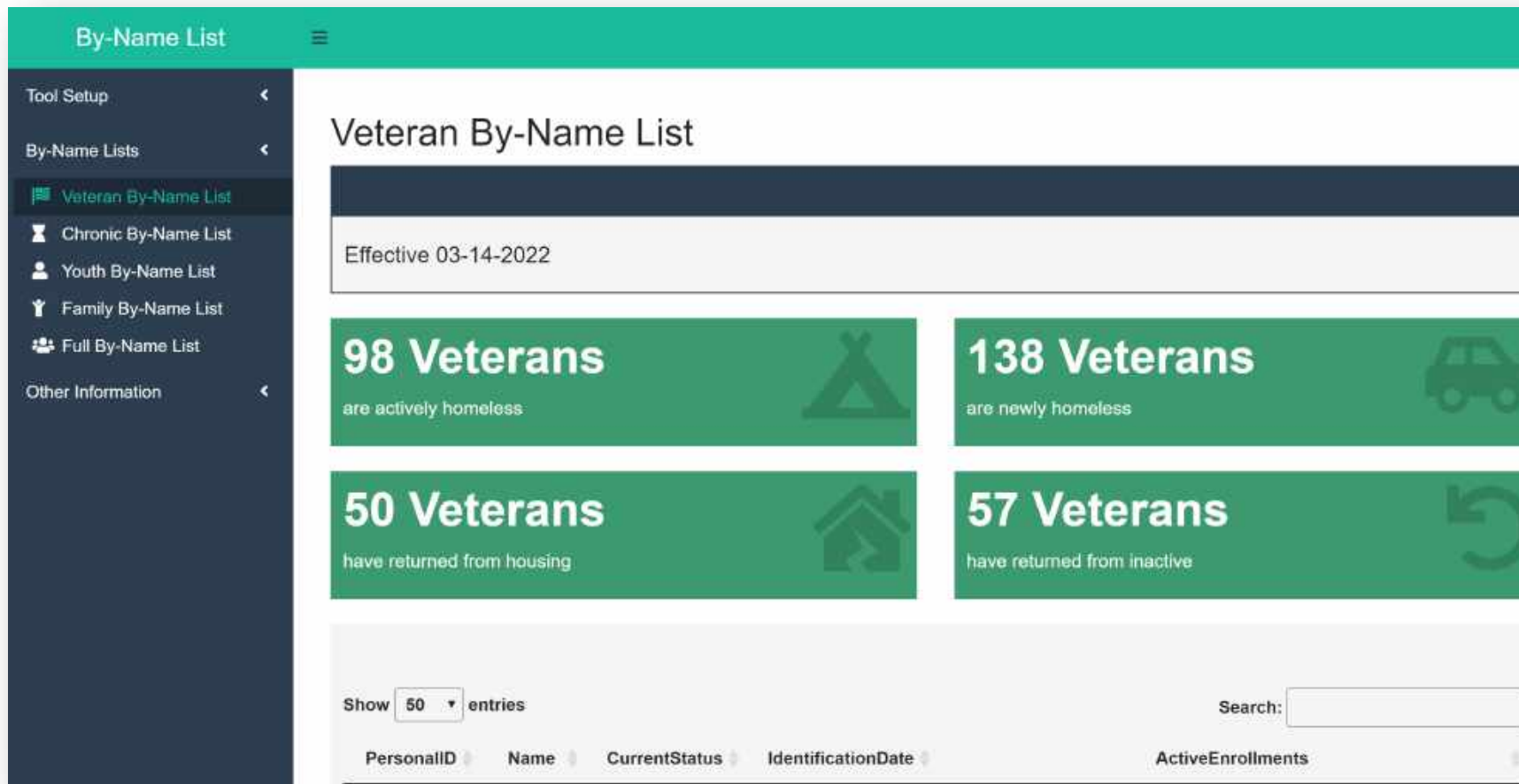


## Version V



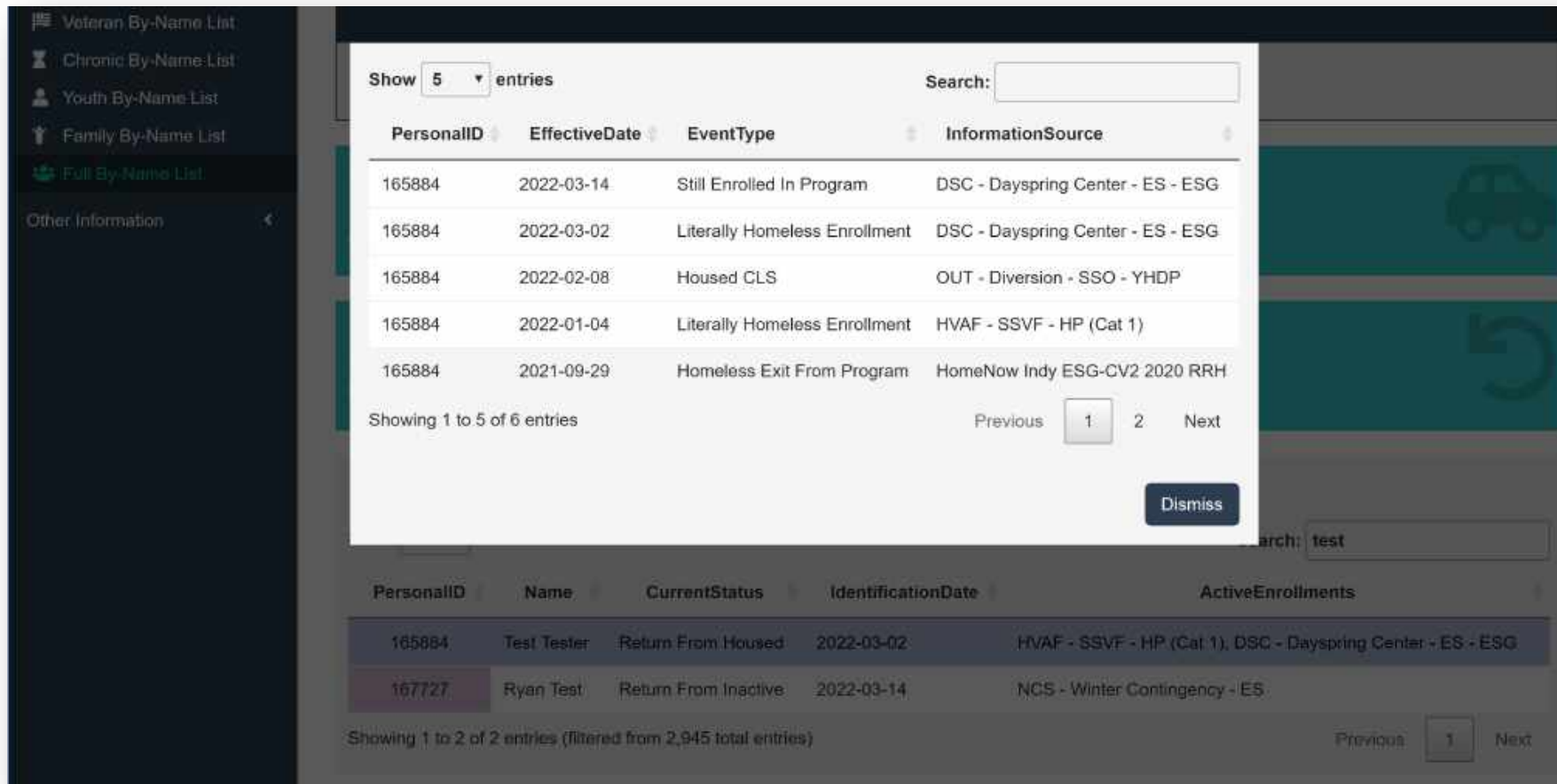


## Version V





## Version V



The screenshot displays a web application interface for the NHSDC Spring 2022 Conference. A modal window is open, showing a table of events. The table has columns for PersonalID, EffectiveDate, EventType, and InformationSource. The data is as follows:

PersonalID	EffectiveDate	EventType	InformationSource
165884	2022-03-14	Still Enrolled In Program	DSC - Dayspring Center - ES - ESG
165884	2022-03-02	Literally Homeless Enrollment	DSC - Dayspring Center - ES - ESG
165884	2022-02-08	Housed CLS	OUT - Diversion - SSO - YHDP
165884	2022-01-04	Literally Homeless Enrollment	HVAF - SSVF - HP (Cat 1)
165884	2021-09-29	Homeless Exit From Program	HomeNow Indy ESG-CV2 2020 RRH

Below the table, it says "Showing 1 to 5 of 6 entries". There are navigation buttons: "Previous", "1" (selected), "2", and "Next". A "Dismiss" button is also present.

The background interface shows a sidebar with navigation links: "Veteran By-Name List", "Chronic By-Name List", "Youth By-Name List", "Family By-Name List", "Full By-Name List", and "Other Information". The main content area has a search bar with the text "test" and a table with columns: "PersonalID", "Name", "CurrentStatus", "IdentificationDate", and "ActiveEnrollments". The data is as follows:

PersonalID	Name	CurrentStatus	IdentificationDate	ActiveEnrollments
165884	Test Tester	Return From Housed	2022-03-02	HVAF - SSVF - HP (Cat 1), DSC - Dayspring Center - ES - ESG
167727	Ryan Test	Return From Inactive	2022-03-14	NCS - Winter Contingency - ES

At the bottom, it says "Showing 1 to 2 of 2 entries (filtered from 2,945 total entries)". There are navigation buttons: "Previous", "1" (selected), and "Next".

I think I saw my vendor  
and want this list in  
HMIS eventually



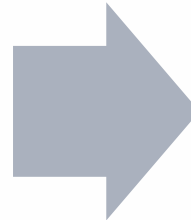
Email me!  
I'll give it to you

I don't think I saw my  
vendor and want this list  
in HMIS eventually



Talk to me after the session,  
I'll help with development!

I want to generate this list  
from my csv export  
immediately



Scan the QR code on the  
next page for the link  
(yes, seriously)

**Thanks for listening!**

Gwen Beebe

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360.897.8788



Scan me for a link  
to the code to  
process your own  
CSV export!