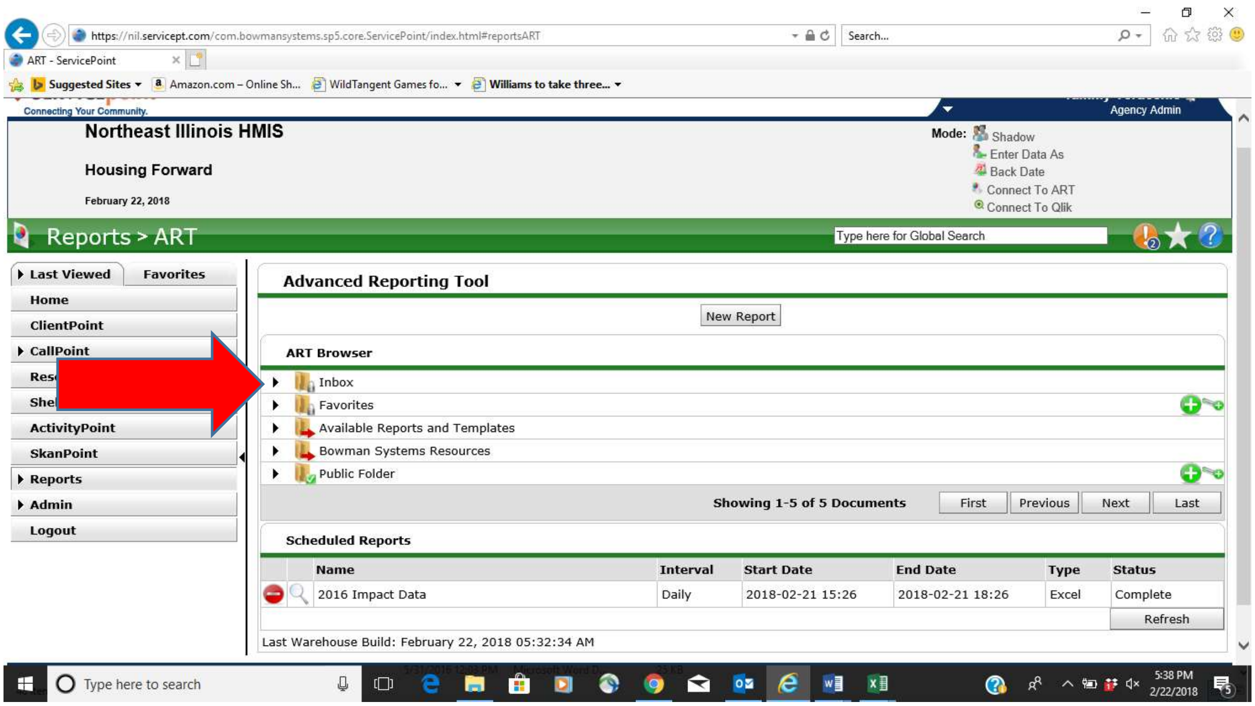
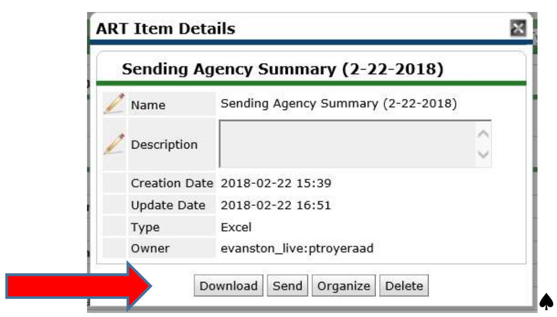
Sending Agency report instructions

This report pulls all participants that are currently on or exited (after 7/1/2017) from the By Name List (BNL). This is a scheduled report that will be added to your ART Inbox every Monday morning. Note that only users with an Art license can be scheduled to receive this report.

To view the report, navigate your Art Inbox. Expand the Inbox folder.



Select the desired report, click the magnifying glass and Download.



The report will return data on several report tabs. Each report tab is described below.

BNL Summary

Purpose:

Provide a snapshot of numbers of participants currently active or exited (after 7/1/2017). Number of participants in each stage of the housing process are identified along with the average length of time in that stage.
This report tab provides an overall gauge for how long it is taking your agency, on average, to move participants through the housing process (for specific clients, see subsequent tabs).

Report Details:

Participants will be included in the summary totals if:

1. They have proper consent and have agreed to sharing with the CE team
2. They are active on the BNL or have been exited after 7/1/2017

Not Doc Ready

Purpose:

Identify chronically homeless persons that are not yet document ready. A participant is not considered document ready for PSH until Part 4 (CE VI-SPDAT Consent & VI-SPDAT Assessment), Part 5 (which includes disability and homelessness history) and Part 6 of the Phased Assessment have been uploaded and reviewed by the CE team.

Initially, the CE team was matching highly vulnerable participants prior to having documentation complete. As a result, there may be some participants with match dates even though documentation is not yet complete.

Unless there are special circumstances (i.e., the receiving agency is willing to accept a referral while documentation is still being gathered), the CE team is no longer matching participants to PSH until documentation has been reviewed. Therefore, getting a participant's documentation completed is extremely important. Participants with the highest VI-SPDAT score should be prioritized to complete documentation.

CE policy states that agencies should be working on documentation for all chronically homeless persons with a VI-SPDAT score of 8 or more.

If a participant is on this report but you think they should be doc ready, contact CE team.

Report Details:

Participants will show up on this list if:

1. They have proper consent and have agreed to sharing with the CE team
2. The HMIS team has determined the participant is chronically homeless.
3. The participant's documentation is not yet complete.

Participants are sorted by VI-SPDAT score, with highest scores at the top of the list.

Match Status (with two agencies involved)

Purpose:

This report tab has 4 sections – Matches Pending Client Decision, Accepted matches – Not yet referred, Matched – Active Referral, and Declined Matches.

Matches Pending Client Decision identifies participants that have been extended a housing offer but have not yet accepted or declined the offer. CE policy states that every effort should be made to make the offer to the participant within 5 business days. Agencies should review this section to ensure that offers are extended in a timely manner and that the CE team has been informed of the participant's decision.

Accepted Match – Not yet Referred identifies those participants that have accepted the offer, but the referral to the receiving agency has not yet been completed. This section is primarily a check for the CE team to ensure referrals are made in a timely fashion and the participant's record is updated in the system. Periodically, there will be a match made before the client is doc ready but the official referral date will not be recorded until the documents are ready or if the receiving agency agrees to accept the referral without completed documents.

Matched – Active Referral allows the sending agency to see the housing status of participants from their agency. This section will help sending agency navigators stay informed about the progress toward housing their clients.

Declined Matches allows the sending agency to see the length of time between the housing match and declining the match as well as identifying clients with multiple declined offers. CE policy states that offers should be accepted or declined within 5 business days. Additionally, focused case management may be required for clients with multiple declined offers to determine why offers are being declined.

Report Details:

Participants will show up on this list if:

1. They have proper consent and have agreed to sharing with the CE team
2. The HMIS team has determined the participant is chronically homeless
3. Participant has been matched to housing through the CE process

Internal Referrals (matches/referrals within same agency)

Purpose:

Identify and track participants referred within your own agency. The hope is that sending and receiving projects within the same organization will work closely together and would have shortened time in each phase of the housing process. Additionally, participants being housed within a familiar agency may have a lower rate of rejected offers and referrals.

Report Details:

Participants will show up on this list if:

1. They have proper consent and have agreed to sharing with the CE team
2. Participant has a housing referral
3. The sending and receiving agency are the same

Housed

Purpose:

Allow the sending agency to see the housing status of participants from their agency. Sending agencies should confirm they have correctly exited participants from homeless projects once housed.

Report Details:

Participants will show up on this list if:

1. They have proper consent and have agreed to sharing with the CE team
2. They were housed through the CE process

Exit Data

Purpose:

Summarizes exits from the BNL by reason. Also provides the list of participants that have been exited with the reason for exit.

Participants are exited from the BNL when housed (either on their own or through CE).

Participants will also be exited if there has been no contact with any CoC provider for 90 days. This information should be used to identify how many participants (and who) the agency is losing contact with.

Report Details:

Participants will show up on this list if:

1. They have proper consent and have agreed to sharing with the CE team
2. The participant has been exited from the BNL since 7/1/2017

Offer Data

Purpose:

Provide a summary of all matches for the sending agency's participants.

This report tab is information only.

Report Details:

Participants will show up on this list if:

1. They have proper consent and have agreed to sharing with the CE team
2. They were matched through the CE process.

BNL Data

Purpose:

Provide summary data for all sending agency participants currently active or exited from the BNL after 7/1/2017. This report tab provides the data for all the other tabs on the report.

Agencies can download this report tab into Excel and manipulate the data as desired.

Report Details:

Participants will show up on this list if:

1. They have proper consent and have agreed to sharing with the CE team
2. They are currently active or exited from the BNL after 7/1/2017.

Additional notes:

The primary action items from this report are:

1. Provide a prioritized list of clients that are not document ready
2. Provide a list of participants that have an outstanding match (offer needs to be accepted or declined)

Open issue - Only participants that the HMIS team has determined are OK to share will be included on the report. At this time, an individual agency will not be able to see their own clients that have denied sharing on this report.

To use with Missing VI-SPDAT report:

The Missing VI-SPDAT report provides a list of participants that need work done before they can be considered for housing (placed on the BNL) – participants must have a VI-SPDAT and must have a signed and uploaded CE VI-SPDAT consent form (there are two tabs on the Missing VI-SPDAT report that give this information.

If you compare the list of chronic clients on your Missing VI-SDAT report with the BNL Data tab on the Sending Agency Report, you may find there are chronic clients at your agency who should be on the BNL but are not. This will allow you to determine the reason a client is not on the BNL and resolve the issue. Please contact the CE Lead Team or HMIS staff if you cannot determine why your client is not on the BNL. (Note, per the open issue above, if your client is not marked OK to share, they will not be on the Sending Agency report but may be on a list for housing, please contact the CE team or HMIS to discuss).