



By-Name Data (BND) Scorecard 4.0 Guide

Note (October 2026): Our team is in the process of updating this resource. If you encounter any issues, don't hesitate to contact us at bfz@caeh.ca.



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Introduction

What is the By-Name Data Scorecard 4.0 Guide?

This Guide provides a short overview of what By-Name Data (BND) is, explains what the By-Name Data 4.0 Scorecard (BND Scorecard) is and how it was developed, makes suggestions for how to use it, and walks you through the BND Scorecard questions. For each BND Scorecard question, further information is provided on:

- An overview of the question;
- Additional details to help interpret and score the questions for each level of quality;
- Tips, resources, and community examples for moving forward, and;
- Tips for HIFIS 4 (where applicable).

This Guide is not the BND Scorecard itself. The [BND Scorecard 4.0](#) and further information about BND can be found on the [By-Name Data](#) page under Resources on the Built for Zero Canada website at www.bfzcanada.ca. Note that communities working with the [Canadian Alliance to End Homelessness \(CAEH\)](#) through [Built for Zero Canada \(BFZ-C\)](#) can find their personalized copy of the Scorecard to document progress for their community in their on-line Change Package.

Please read our thoughts below on how to use this tool before continuing onto the BND Scorecard questions.

What is By-Name Data?

By-Name Data (BND), is real-time, person-specific data for people experiencing homelessness across the community (contained in the community's HMIS/HIFIS or other database).

BND provides a robust set of data points that support [Coordinated Access](#) at a household level and an understanding of community trends (inflow, outflow, total active homelessness) at a system level.

There are six key system-level data points that can be captured through BND to support an in-depth understanding of entries into homelessness (inflow), exits out of homelessness (outflow), and those actively experiencing homelessness. See *Figure 1: Key By-Name Data Points* for an overview of inflow, outflow, and actively homeless data points. Further information about the six BND data points is included in the [By-Name Data Data Reliability Tool](#).



Figure 1: Key By-Name Data Points



Further BND information and resources can be found on the [By-Name Data](#) page under “Resources” on the Built for Zero Canada website at www.bfzcanada.ca,

What is Quality By-Name Data?

The Scorecard supports communities to develop and maintain quality BND, which in summary includes the components outlined in *Figure 2: Key Components of Quality By-Name Data*. For further detail, see the [BFZ-C 9 Dimensions of Quality Data](#).

Figure 2: Key Components of a Quality By-Name Data (BND)

Comprehensive Coverage	• Agencies and programs that serve as access points are adding/updating client information. • The BND includes people experiencing hidden, provisionally accommodated, sheltered, and unsheltered homelessness
Real-Time Updates	• The dataset is updated in as close to real-time as possible, monthly at minimum, in accordance with an Inactivity Policy • As people’s housing status changes, those changes are reflected in the dataset, so that people who are no longer experiencing homelessness are no longer showing as active.
Person-Specific	• Each person has an entry that includes their name, housing history,



Data	and housing needs • Each person can be followed through the system of services to ensure they can get the help they need
Reliability	• Inflow, outflow and total active homeless data can be extracted • Data balances month over month, just like your bank account

Some benefits of a quality BND include:

- Smarter Triage
 - Target limited housing resources to the most vulnerable individuals and families
 - Stretch resources further by connecting people to the most cost-effective support to meet their needs
- Improved Systems
 - Use aggregate data to see trends, flag bottlenecks, and identify improvement opportunities across the homeless-serving system
 - Test new strategies and know quickly whether efforts are reducing homelessness
- Resource Advocacy
 - Ground your advocacy in concrete data
 - Use monthly data trends to make stable projections and quantify your projected resource gaps

Confirming Quality Data

CAEH reviews a community's BND Scorecard and BND monthly data to confirm Foundations Quality BND. Foundation level Quality BND confirmation includes three components:

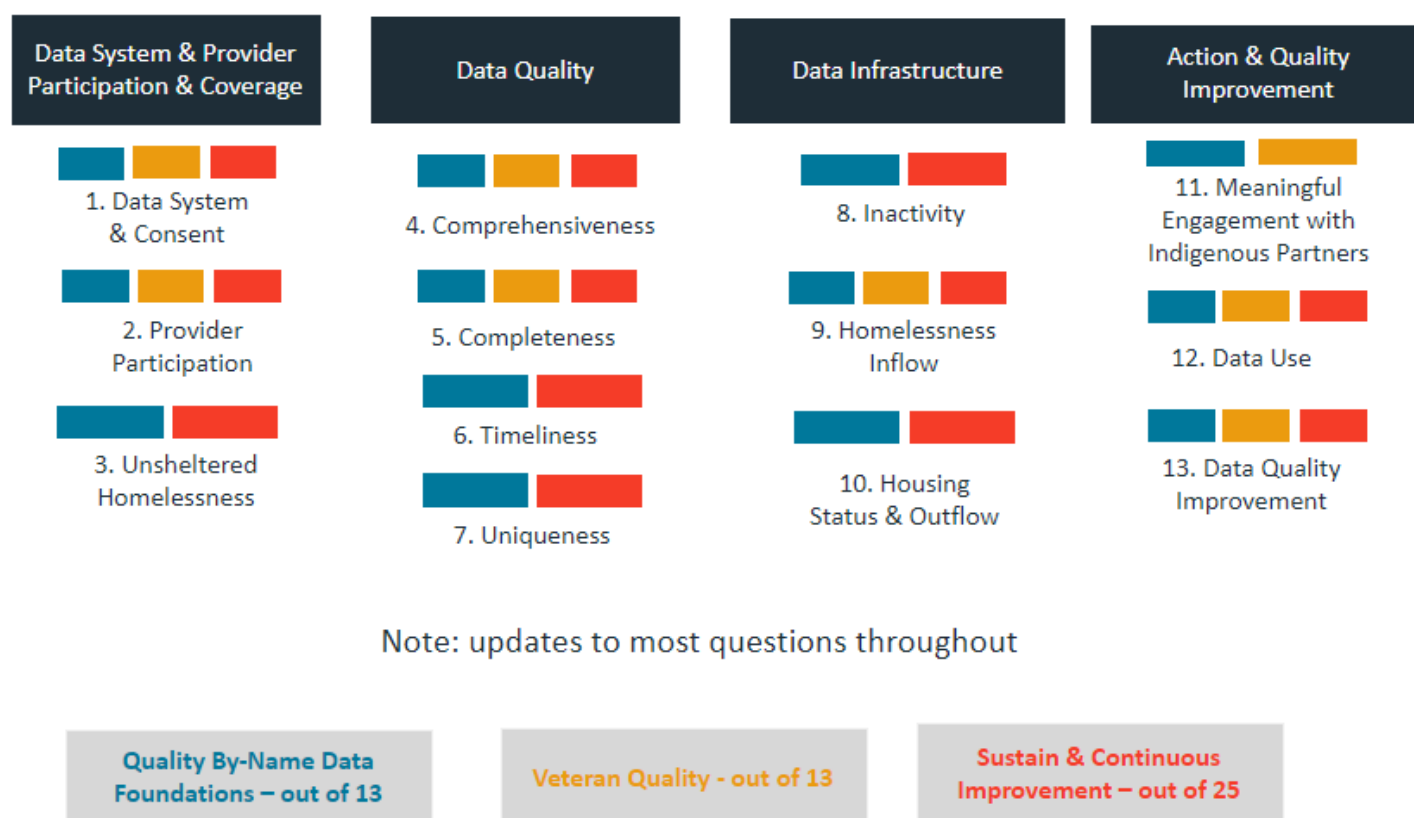
1. A confirmed score of 13/13 on the BND Foundations Scorecard supported by:
 - A completed BND Scorecard notes column
 - A completed Outreach Coverage and Coordination Tool
 - A completed Systems Map
 - A review of relevant policies and documents
 - A review of the community's anonymized BND and demonstration of how aggregate BND points are extracted
 - A HIFIS Health Check (if using HIFIS)
2. At least three consecutive months of complete chronic BND where the last 3 months are reliable within a 5% margin of error
3. Setting a baseline month from which to measure chronic homelessness reductions



CAEH can also confirm Veteran Quality By-Name Data which builds on the Foundations Quality BND confirmation.

What is the By-Name Data Scorecard 4.0?

The BND Scorecard is a 13-question tool intended to provide guidance on how to develop, sustain and continuously improve BND for all individuals and families in a community, as well as provide a means to assess whether the data is of sufficient quality to track progress in reducing and [ending homelessness](#) in the community.



See *Figure 3: By-Name Data Scorecard 4.0* for an overview of the 13 key quality elements.

Figure 3: By-Name Data (BND) Scorecard 4.0

The BND Scorecard sets out an ambitious framework for building the necessary data management and systems coordination practices to follow and support the movement of everyone experiencing homelessness in the community towards housing with the ultimate goal of [ending homelessness](#). It is critical to note that BND is useful only to the extent that it is operationalized as a driver of your community's efforts to reduce and end homelessness.



Developing and maintaining BND can be time consuming and needs to happen in the context of a community's efforts to prioritize people for housing resources, optimize the local homeless-serving system, assess and maximize resources, and advocate for and think creatively about addressing resource gaps.

As identified in *Figure 3*, the BND Scorecard questions are organized into four sections:

1. Data System and Provider Participation and Coverage
2. Data Quality
3. Data Infrastructure
4. Action & Quality Improvement

And includes three levels of quality:

1. Foundations Quality BND (13/13)
2. Veteran Quality BND (13/13)
3. Sustain & Continuous Improvement (25/25)

These three levels of the BND Scorecard (Foundations, Veteran, Sustain & Continuous Improvement) are not intended to indicate that some elements are more important than others. Rather, the levels are intended to help communities “shrink the change” and focus on the foundational and often easier elements to start with to get to real-time reliable data as quickly as possible. The Scorecard scoring is progressive and for each question, a community must satisfy Foundation requirements before receiving points for Veteran or Sustain & Continuous Improvement items (Veteran items not required for Sustain & Continuous Improvement).

How was the By-Name Data Scorecard 4.0 Developed?

The By-Name Data (BND) Scorecard was first developed by Community Solutions, an American organization focused on helping communities end homelessness and the conditions that create it. Community Solutions brought together leading communities, federal partners, and national experts to create a shared quality standard against which local systems can be measured.

The Canadian Alliance to End Homelessness (CAEH) worked with Community Solutions to adapt the BND Scorecard 1.0 for Canada in 2016. In December 2018, the BND Scorecard 2.0 was introduced after consultations with CAEH Built for Zero Canada communities, Employment and Social Development Canada (ESDC), and other key partners. In 2020, it was updated to Scorecard 3.0 to align more closely with federal Reaching Home directives, integrate the Veteran BND Scorecard components, incorporate emerging best practices, and enhance the format and clarity of questions. The latest update, BND Scorecard 4.0, was released in



November 2024. Watch the Scorecard 4.0 launch webinar to learn about the Scorecard evolution and updates - [Recording](#) and [Presentation](#).

Why Should Communities Use the By-Name Data Scorecard 4.0?

Using the BND Scorecard 4.0 has many benefits:

- It clearly identifies the elements of a quality BND and provides the community with standardized steps and detailed “specs” for working together to build effective BND;
- The scoring provides an easy way to track progress towards quality BND;
- It helps to focus community efforts and identify areas for continuous improvement;
- It provides a common language for communicating progress towards quality BND; and
- It provides assurance to communities that their BND includes all the essential and best practice elements for working towards an end to homelessness.

The Foundations level of the BND Scorecard helps communities not only put the foundations of quality data in place, it helps communities meet funder requirements e.g.:

- Reaching Home requirements are included in the [Reaching Home Checklist](#) and are aligned with the BND Scorecard Foundations level.
- Ontario requirements are outlined in the [Ontario By-Name Data 2022 Guidelines](#) and are aligned with the BND Scorecard Foundations level.

Communities can then use the BND Scorecard to go beyond these minimum requirements, by working on the BND Scorecard Sustain and Continuous Improvement level. Continuous improvement is the name of the game!

Using the Scorecard and confirming quality BND through CAEH will allow communities to adhere to clearly articulated national standards to ensure a degree of confidence in the community's data. This in turn provides a degree of confidence when measuring progress on reductions and towards reaching and sustaining [functional zero](#).

How to Use the By-Name Data Scorecard 4.0

Communities can use the By-Name Data (BND) Scorecard as a self-assessment (with the support of this Guide) to:

- Get a snapshot of their local progress towards a quality BND;
- Identify areas for improvement, and;
- Plan their next steps.

The Canadian Alliance to End Homelessness (CAEH) uses this tool with communities participating in Built for Zero Canada (BFZ-C) to:



- Assess their baseline level of BND implementation to inform coaching, training and support;
- Monitor and celebrate progress towards a quality BND;
- Confirm communities with a quality BND;
- Identify bright spot approaches to share with other communities, and;
- Support continuous improvement.

The Lead organization for the BND should familiarize themselves with the Scorecard and read through the Scorecard Guide (note that in the BND Scorecard, each question is linked to the appropriate questions in this Guide). The BND Scorecard can be customized by hiding rows or columns to focus your efforts (e.g. hide the Veteran and Sustain & Continuous Improvement columns in order to first focus on Foundational items).

Next, invite the right people to the room. It is helpful to complete the BND Scorecard with the full group of local stakeholders working to end homelessness, rather than having one or two people complete the Scorecard alone. When people complete the Scorecard as a group, they clarify policies and identify service strengths and gaps. Completing the BND Scorecard should take about 60 minutes, depending on how much conversation is generated. Here are some ideas for [Scorecard Group Exercises](#) when working in a larger group. It is suggested that communities take the BND Scorecard regularly while working towards confirmations, and at least annually thereafter.

A score is a baseline, not a judgement. It should help communities create action plans and measure improvement towards a comprehensive quality BND.

Note that scoring a 13/13 on the BND Scorecard for Foundations Quality does not mean that a community's BND is complete. The quality of a BND is measured not only by the BND Scorecard, but also by the quality of the data that a community's BND produces. The ability of a By-Name Data to produce reliable real-time data is just as important as having a 13/13 (Foundations) or 25/25 (Sustain & Continuous Improvement) on the BND Scorecard.

Without quality data, a community cannot:

- Understand where you are relative to the goal of ending homelessness;
- Make projections or set meaningful reduction goals;
- Accurately measure progress and performance;
- Get to functional zero on chronic homelessness AND stay there.

Communities should review the six key BND data points outlined in [Figure 1](#) month over month. Reach out to [CAEH](#) if you would like additional support.



How to Use this Guide

The guide walks through the 13 questions of the Scorecard organized by the four sections:

1. Data System and Provider Participation and Coverage
2. Data Quality
3. Data Infrastructure
4. Action & Quality Improvement

The following is available after each question:

- An overview of the question
- Additional details to help interpret and score the questions for each level of quality;
- Tips, resources, and community examples for moving forward, and;
- Tips for HIFIS 4 (where applicable).

There are a number of ways to use the BND Scorecard Guide, including:

- Reading through the full Guide before answering the BND Scorecard;
- Reading the information for each question as you answer the BND Scorecard questions, or;
- Referring to the Guide when you are seeking more clarity or ideas on how to move forward.

Review the [Homelessness Glossary for Communities](#) as you work your way through this guide to help define and describe some of the terms and concepts referenced from federal documents.



BND Scorecard 4.0 Questions

Part 1: Data Systems & Provider Participation and Coverage

1. Data System & Consent

Questions in the BND Scorecard 4.0

1. Data System & Consent

Question	Foundations	Veteran	Sustain & Continuous Improvement
1.1 Is a single data system actively being used to manage community By-Name Data? - An HMIS/HIFIS is being actively used as the single data system for Coordinated Access and the Outcomes Based Approach. If Reaching Home funded and/or using HIFIS, a Data Provision Agreement (DPA) has been signed with Housing, Infrastructure and Communities Canada (HICC) (see Documentation Checklist #13). If using HIFIS, has the community updated HIFIS to the latest version that was most recently confirmed as mandatory by HICC? - If using a HMIS/HIFIS, is it set up such that all Homeless-Serving System Providers (HSSPs) (at minimum) within a defined geographical area participate within a single cluster? (i.e., so that data can be shared as access rights and consent(s) allow)	☐ Yes (+) ☐ Yes (+) ☐ Not Applicable ☐ Yes (+) ☐ Not Applicable	☐ The single data system used in the community is also used as the single data system for Veteran homelessness ☐ Community is recording both self-reported and confirmed Veteran status	☐ Continue to update to recent versions of HMIS/HIFIS and servers that support them ☐ Have reviewed and filled in BND Continuous Improvement Tool #1
1.2 Are local agreements in place to manage privacy, data sharing and client consent related to the HMIS? These agreements must comply with municipal, provincial/territorial and federal laws and include: - A Community Data Sharing Agreement - A Client Consent Form (See Documentation Checklist #14)	☐ Yes ☐ Yes	☐ Veteran Service Providers have been included in local data sharing processes/documents as needed	☐ Safeguards established to ensure the data collected is secured from unauthorized access ☐ Implemented a User Agreement ☐ Implemented a Service-Level Agreement ☐ Developed a Privacy Impact Assessment (PIA) ☐ Have reviewed and filled in BND Continuous Improvement Tool #6
Points earned:	0	0	0



Additional Details: Data System & Consent

Question 1.1 Single Data System

Foundations, Veteran, Sustain & Continuous Improvement

Scorecard Question 1.1 Alignment with Reaching Home

This question aligns with [HIFIS Minimum Requirements 1, 3, and 4](#).

A Single Data System

A single data system supports comprehensive By-Name Data. Where a community is not required to implement HIFIS, they may use another HMIS or a tool like Microsoft Excel as their single data system. However, the use of an HMIS (like HIFIS) is recommended to reduce duplication of efforts and support streamlined and cohesive data entry and data analytics over time.

A **Homelessness Management Information System (HMIS)** is a web-based software application that collects client-level data and manages service provider information over time within a homeless-serving system. An HMIS serves as a comprehensive data collection, case management, and reporting system that assists providers across a community with both day-to-day operations and the ability to better serve clients through coordinated service planning. In general, a HMIS needs to support the implementation of Coordinated Access by allowing multiple service providers from the same community to access real-time data and refer clients to the appropriate services.

The **Homelessness Individuals and Families Information System (HIFIS)** is the Reaching Home HMIS. Under Reaching Home, the use of HIFIS is mandatory for all Community Entities under the Designated Communities stream and for territorial capitals under the Territorial Homelessness stream that are not already operating with an equivalent HMIS prior to receiving Reaching Home funding. Developed by the Government of Canada, and in collaboration with communities across Canada, HIFIS is provided to communities free of charge. Communities using HIFIS sign a Data Provision Agreement (DPA) between the Community Entity and Housing, Infrastructure and Communities Canada (HICC) that outlines the roles and responsibilities between both parties, as well as authorizes HICC's collection of certain non-directly identifiable data fields.



Active Use

The term “active use” refers to regular use of the software by all homelessness response providers (at minimum by those required by funding) and includes activities such as:

- Managing client data and service provider information, document service transactions, and track interaction with the Coordinated Access system;
- Integrating use into daily workflows and ensuring timely data updates;
- Supporting data accuracy through consistent data entry and audit practices; and,
- Using data to inform action in policy-making, program planning, performance management, investment strategies and/or service delivery.

Under Reaching Home, active use of the software includes generating data for a Unique Identifier List in order to meet Coordinated Access requirements, as well as generating data for outcome reporting in order to meet Outcomes-Based Approach requirements.

A Single Cluster

Service Providers in HIFIS can be organized into Clusters. A Cluster is a group of Service Providers that agrees to share a common pool of clients. In other words, Service Providers within the same Cluster are sharing data with each other about common clients. In order to utilize HIFIS for Coordinated Access, Service Providers must be sharing data with each other, which translates to mean that they must be utilizing the same Cluster. If Service Providers are in separate Clusters from each other, they will not be able to share any data with each other, via HIFIS, at all.

In some HIFIS instances, there could be some organizations who find data sharing an insurmountable obstacle, yet still intend to use HIFIS. In these situations, it would be useful to ask two different “why” questions: (A) why is data sharing so problematic, and (B) why is using HIFIS so important? If the answer to A is truly insurmountable (e.g. conflicting legislative requirements), then perhaps there is no reason for the organization to use HIFIS. If the answer to B is because of Reaching Home funding requirements, then it's worth pointing out that the requirement of Reaching Home is for funded organizations to participate in Coordinated Access, which requires data sharing. The only benefit to having Service Providers on HIFIS but in a separate Cluster (as opposed to not being on HIFIS at all, or being on a separate HIFIS instance) is collectively lower operating costs (i.e. the non-participating HSSP wouldn't have to pay for their own HMIS).

Case Study: Shelters for victims of domestic violence (DV) are often in this situation. Imagine a community where all Homelessness System Service Providers (HSSPs) are using HIFIS, and



there is also a DV shelter. The DV shelter is obligated to protect the privacy of its clients, and rightly so. Most clients would not participate in Coordinated Access, but some might. Meanwhile, other stakeholders in the Coordinated Access system would be interested in collaborating with the DV shelter to reduce duplication of services and ensure that the local picture of homelessness is complete and accurate. If the DV shelter were to utilize HIFIS but in a separate Cluster, they would not be able to share any data with other HSSPs in the community, nor would they be able to participate in Coordinated Access. However, if in the same Cluster, they could share data about clients who have consented to participate in Coordinated Access via the Consent mechanism, while keeping their non-consenting clients hidden or private.

Sustain & Continuous Improvement

Current HMIS/HIFIS Versions and Servers to Support Them

HMIS/HIFIS is constantly being updated to make improvements and address bugs. If your community is not running a recent version of the software, you may encounter problems with your data or may not be optimizing or taking full advantage of the system.

A reliable and efficient server is critical for supporting HMIS/HIFIS operations. Consider the following questions to assess your community server's capacity and performance in supporting your HMIS/HIFIS system:

- Is your server sufficient to handle operations smoothly and efficiently?
- Does the server experience frequent downtime or performance issues?
- How would you rate the speed and reliability of your system?
- Is the server dedicated solely to HMIS/HIFIS, or does it support other systems as well?
- How often is your system maintained, backed up, and monitored for capacity?
- What is the current size of your system database? Please note if it is under or over 10GB, as this affects operating system requirements and potential costs.
- How many users does your system database have? (Date)
- How many clients are in your system database? (Date)
- How many Clusters are being used in your system database? (Date)
- How many Service Providers are using your system database? (Date)
- Do you have the ability to directly query/access the database?

Review the [BND Continuous Improvement Tool #1](#) to help fill this section.



Question 1.2: Privacy, Consent, Data Sharing, & Safeguarding

Foundations, Veteran, Sustain & Continuous Improvement

Scorecard Question 1.2 Alignment with Reaching Home

This question aligns with [HIFIS Minimum Requirement 4](#).

Prior to implementing a single data system (e.g. HMIS/HIFIS), communities must ensure that privacy, consent and data safeguarding measures are in place. This is accomplished, in part, through:

- A Community Data Sharing Agreement (signed with the single data system/HMIS/HIFIS host and the participating service providers);
- A Client Consent Form (signed with individuals and families) and;

Protocols for obtaining participant consent to retain and share information for the purposes of assessing and referring participants is one of the minimum policies and procedures required by Reaching Home. Questions to consider with consent are:

- Does your consent form automatically expire after a period of time?
- Does the consent include broader language to include agencies working in the system?
- Is there a process in place for the consent form to be reviewed (including by people with lived/living experience/expertise)
- Is there a process in place to review and update consent protocols
- Is there a process in place to store consents or upload the Consent into HMIS/HIFIS in a timely manner?
- Is there a process in place to ensure clients who decline consent can still access necessary services?
- Is there a policy in place outlining which services can or cannot be accessed without consent?
- When a client refuses to consent, what procedures are followed to revisit and attempt to obtain consent at a later date?

Sustain & Continuous Improvement

Safeguards should be in place to ensure the data collected is protected from unauthorized access e.g.:

- Physical measures (e.g., controlling access to offices, turning computer screens from public view)



- Technology measures (e.g., passwords, encryption, firewalls, security patches, data loss prevention)
- Administrative measures (e.g., administrative actions, and policies and procedures to manage the selection, development, implementation, and maintenance of security measures).

It is also good practice to complete a more fulsome Privacy Impact Assessment (PIA). A PIA is a process used to determine how a program or service could affect the privacy of an individual. It can also help to eliminate or reduce potential privacy risks resulting from that program or service. Overall, a PIA helps promote transparency and accountability regarding how organizations manage personal information. Considerations can include whether the community has processes in place to ensure client data is stored, shared, and disposed of in ways that ensure privacy and security and that you have processes in place should there be a breach of data or privacy.

Other documents to have include a User Agreement for staff and anyone with access to the HMIS/HIFIS/BND, requiring them to sign an oath of confidentiality and commit to protecting client data. A Service Level Agreement should also be in place to outline roles and responsibilities, such as who is responsible for training staff on HIFIS/HMIS and ensuring data quality.

Review the [BND Continuous Improvement Tool #6](#) to help fill this section.

Tips & Resources: Data System & Consent (Questions 1.1 and 1.2)

- Visit the [By-Name Data](#) page to find the following drop-downs:
 - Homeless Individuals and Families Information System (HIFIS) - one-stop for HIFIS tools and information
 - Privacy, Consent, and Data Sharing - with information and community examples
- Visit the [HIFIS Library of Resources](#) which includes all key HICC HIFIS resources including further information on configuration, data privacy and consents, and strengthening data management practices.
- [Reaching Home Homelessness Glossary for Communities](#) - see Chapter 6 for further information on using HIFIS as an HMIS including consent functions in HIFIS.
- There is legislation in each province/territory with respect to the handling of personal information. Communities are encouraged to consult a lawyer, the Lead Organization's



privacy officer, and/or contact the provincial Information and Privacy Commissioner's (IPC) Office for further information and assistance.

Veteran Tips and Resources: Data System and Consent

- Data on Veterans experiencing homelessness should be included in your overall community Homelessness Management Information System (e.g., HIFIS). Given what is often a smaller number of Veterans experiencing homelessness, communities sometimes find it helpful to further track Veteran Homelessness on an Excel Spreadsheet (downloaded from and cross-referenced with their data system). See for example the [CAEH BNL Excel Workbook](#) and [CAEH BNL Excel Workbook Guide](#).
- The definition of Veteran homelessness:
 - A **Veteran experiencing homelessness** includes those who do not have stable, permanent, appropriate housing, or the immediate prospect, means and ability of acquiring it (paraphrased from COH and the Government of Canada's National Housing Strategy).
- Built for Zero Canada has aligned its veteran definition with Veteran Affairs Canada. According to Veterans Affairs Canada:
 - A **Veteran** includes any former member of the Canadian Armed Forces along with former members of Allied Forces (e.g., U.S./U.K veteran), former members of the RCMP, former Reservists, Veteran Civilians, and former Canadian Rangers.
- Be sure to record both Veteran self-report and when Veteran status has been confirmed. For further information on confirming Veteran status, refer to Q# 5.1.
- Update your Common Consent Form and/or data sharing agreements/protocols to include new Veteran service organization partners. The sharing of information (as needed and with consent) will support individualized problem-solving among partners to support Veterans experiencing or at-risk of homelessness to retain their existing housing or find and establish stable housing.
- For further information, reference the [BFZ-C Ending Veteran Homelessness Community Guide](#) – a 20 page guide with definitions, initial steps, information to support partnering with Veteran service providers, tips for asking the Veteran question, instructions for confirming Veteran status, and more.





2. Provider Participation

Questions in the By-Name Data Scorecard 4.0

Additional Details: Provider Participation

2. Provider Participation

Question	Foundations	Veteran	Sustain & Continuous Improvement
2.1 Do key service providers actively participate in adding to, updating, and otherwise using the same community HMIS/HIFIS (or other data system)? Refer to the Systems Map ▪ "Homeless-Serving System" Providers (HSSPs). (If funded under Reaching Home Designated Communities or Territorial Homelessness Stream, must include all Reaching Home funded service providers) ▪ "Broader Service System" Providers (BSSPs)	☐ Yes - 90%+ of all HSSPs (+) ☐ Encouraged (+)	☐ Veteran Service Providers participate	☐ Service providers are participating in alignment with local expectations and/or written policies/protocols ☐ All HSSPs are participating ☐ Key BSSPs are participating
Points earned:	0	0	0

Question 2.1: Provider Participation

Scorecard Questions 2.1 Alignment with Reaching Home

This question aligns with [HIFIS Minimum Requirements 3](#).

A real-time representation of the total number of individuals experiencing homelessness relies on complete data entry (both adding people and updating their information). Ideally, every agency/program providing services to homeless populations should be reporting new client information to have client data added to the BND as well as updated information on existing clients, including any changes in client state (i.e. whether they are active with the housing and homelessness response system) and changes in housing status (i.e. whether they are experiencing homelessness, chronic homelessness, or have moved in to housing and have switched to housed status).

Foundations

At the Basic level, although it's ideal to have 100% participation, communities are likely to have sufficient data to project progress toward functional zero if at least 90%+ of key Homeless-Serving Service Providers (HSSP) are reporting data. HSSPs include those who have a primary purpose and/or receive funding to serve the homeless population (e.g. shelter and supportive housing).



Note: The results threshold of 90% + is a general guideline. For example, if 8 out of 9 providers are participating – this would put your results below 90%. But, if that one provider who is not yet participating serves only a very small number of clients who also access services from other participating providers, OR your community has figured out a work-around to serve those people (e.g., in-reach), this would satisfy the requirement. On the other hand, a result could show 95% participation but one of the providers that is missing is the biggest shelter in town or serves a population that no other providers serve. In this case, even though the result is over 90%, the intention of the question may not be satisfied. The 90%+ threshold is a guideline to recognize that while a community may not yet have 100% participation, they have the majority of service providers to capture the majority of people experiencing homelessness on the BND.

Veteran

- Veteran engagement includes veteran service providers in your community who provide services to veterans experiencing homelessness.

Veteran Tips & Resources: Provider Participation

- Review the [*Veteran Homelessness Community Guide*](#).
- Create a list of all known veteran service organizations that work in your community. Try starting with Veteran Affairs Canada (VAC) and the Royal Canadian Legion. Ask these providers who else is working with veterans experiencing homelessness in your community to help build your list. You can also refer to the list of Key Veteran Services Organizations on the BFZ-C website [Veteran Homelessness Resources](#) page and/or use the [VAC Interactive Map to find veteran service providers in your area](#).
- Contact the veteran service providers to determine if they serve veterans experiencing homelessness.
- Exchange knowledge, share your “why”, and consult on ways to ensure veterans experiencing homelessness are known to the system in order to connect them to housing resources and support.
- Remember veteran organizations may have limited knowledge of housing and homelessness processes, terms, and system coordination. Use common language and check assumptions.
- Continue to provide clarification and work toward resolution when barriers arise. For example, it may not be possible for veteran organizations to directly add to or update the BND, but they could refer to an agency that does participate.
- Most communities opt to assign a homeless service provider lead to serve as the point of entry for referrals from local veteran service providers. Develop an agreed upon process that



makes it easy for the veteran experiencing homelessness to access services and be included on the BND to be matched and connected to housing resources.

- Consider forming a veteran working or case conferencing group. See [Sample Veterans Experiencing Homelessness Advisory Committee – Terms of Reference](#) (London, ON 2019)

Sustain & Continuous Improvement

Sustained engagement would include Broader Service System Providers (BSSP) reporting data to the BND. BSSPs include those who offer services to the homeless population, but it is not their primary purpose and they don't receive funding specifically for homelessness (e.g. mental health provider, community health centre, domestic violence shelter, income support, social/affordable housing, library). Check off Sustain & Continuous Improvement when your community agrees the majority of BSSPs most vital for adding and updating your BND are participating. Engage additional BSSP over time as continuous improvement.

Tips & Resources: Provider Participation

- Use the [Systems Map Tool](#) in the Scorecards and Tools document to help answer this question. In the Systems Map, you can list all the Homeless-Serving System Providers (HSSPs) and Broader Service System Providers (BSSPs) in the community that serve people experiencing homelessness. In larger communities, you may begin with just those providers mandated/funded to serve homelessness. In smaller communities, where dedicated homeless response services are limited or not available, you are likely going to include other service providers (e.g., mental health/addictions, libraries, food programs, income support, domestic violence). For the BND Scorecard, focus on those agencies/programs who should be adding/referring to the BND and/or updating the BND to ensure, as much as possible, that you have real-time data on everyone experiencing homelessness in your community.
 - For step-by-step instructions see the [Reaching Home System Mapping Guide and Tool \(2024\)](#)
- Start with early adopters, and use them as a testing group to work out the kinks in the BND policies and protocols. Use learning from this test group to bring other providers on board. Check out this CAEH [Building the Will two-pager](#) for a list of resources to support provider participation and this [Bright Spot from Fayetteville, AR](#).
- If less than 90% of Homeless-Serving System Providers (HSSPs) who should be adding/referring or updating the BND are participating, then you need to increase provider buy-in.



- Determine if you need one “big fish” agency to come on board or several agencies.
- Analyze their reasons for not having aligned yet, and plan to address those reasons.
- Consider if they clearly understand your effort’s goals, intentions, and protocols, and the value of the BND in coordinating access to housing resources for the people they serve. Look for logistical or technological obstacles that are getting in the way; what resources can you marshal to help clear the obstacles?
- Work to solve that problem and set an ambitious goal of getting some or all of them on board within the next three months.
- If they have privacy concerns, share with them your Privacy Impact Assessment or refer to the BFZ-C website [By-Name Data page](#) drop-down on Privacy, Consent and Data Sharing.

HIFIS 4: Tips & Tricks: Provider Participation

- Using HIFIS 4 system-wide is a great way to maximize provider participation. With the appropriate set-up and rights, service providers and staff of all varieties will be able to use HIFIS and play their role in the coordinated access system. Most HRP’s and many OSP’s should be set up as Service Providers in HIFIS, which will allow staff that work or volunteer there to log in and make updates to shared client files. Refer to the [HIFIS Implementation Guide](#) for additional information on Service Providers.
- Service Providers in HIFIS can be organized into Clusters. A Cluster is a group of Service Providers that agrees to share a common pool of clients. In other words, Service Providers within the same Cluster are sharing data with each other about common clients. Because HIFIS contains real-time information about these clients, information about which clients are actively homeless (i.e. on the By-Name Data) can be pulled directly from HIFIS simply by filtering out the clients who are housed and/or inactive. All that is necessary is for Service Providers to participate using HIFIS in the same Cluster.
- In 2020, HIFIS released 59.1 which included functionalities such as the Coordinated Access module. All service providers using HIFIS who are in the same cluster can assist with populating the Unique Identifier List (also known as BND). The Unique Identifier List is generated from HIFIS data; if a HIFIS user updates a client file then generates a new List, HIFIS will automatically use the most up-to-date information.
- Some Broader System Service Providers (BSSPs) (and potentially a few HSSPs) may be unable to use HIFIS; they can still be added to HIFIS in the Directory of Services, which can be used to indicate that a client was referred from or to one of these organizations. Refer to the [HIFIS Implementation Guide](#) for additional information on the Directory of Services.



- While local service providers can be organized in HIFIS, HIFIS does not keep track of the percentage of providers in your community.
- HIFIS can record the Veteran Status of clients. This information can be used as a filter for the Unique Identifier List, to easily view this population for prioritization, or count how many are on the List.

3. Unsheltered Homelessness

Questions in the By-Name Data Scorecard 4.0

3. Unsheltered Homelessness

Question	Foundations	Veteran	Sustain & Continuous Improvement
3.1 Is the geographic coverage of your community's outreach clearly mapped, informed by data and regularly assessed, to ensure the ability to reach all unsheltered individuals within your community? Use the Outreach Coverage and Coordination Tool . ▪ Hotspots for unsheltered homelessness are clearly mapped and updated regularly ▪ Services for unsheltered homelessness have been clearly mapped and are updated regularly	☐ Yes (+) ☐ Yes (+)	--	☐ Written policy/protocol in place that describes how the community continually updates its map and reassesses outreach schedules with evidence of an ability to pivot when needed. These protocols are regularly reviewed and updated.
3.2 Has outreach to people experiencing unsheltered homelessness (including encampments), been coordinated ensuring that outreach is deployed at the locations and the times that it will most likely effectively engage with people sleeping unsheltered, while minimizing duplication between providers? Use the Outreach Coverage and Coordination Tool .	☐ Yes (+)	--	☐ Written policy/protocol in place that describes how outreach teams work together for a coordinated approach to unsheltered homelessness/encampment response and to swiftly connect people to housing. These protocols are regularly reviewed and updated.
Points earned:	0	0	0

Additional Details: Unsheltered Homelessness

Question 3.1: Geographic Coverage

To answer this question, communities need to demonstrate that their outreach efforts are intentional, data-driven, and regularly reassessed to ensure that all unsheltered individuals can be reached.

- A strong outreach strategy begins with clearly mapping areas where unsheltered homelessness is concentrated. This requires working closely with outreach teams, frontline service providers, and individuals with lived experience to identify high-traffic



areas, encampments, and locations where people sleep rough. This map should be updated regularly to reflect shifting trends.

- Beyond identifying where people are, it's essential to map available outreach services. This includes documenting who provides outreach, what supports they offer, and the geographic areas they cover.
- Communities should have a written protocol detailing how outreach maps are maintained and how outreach teams adjust their schedules in response to new data.
- Effective outreach requires well-trained staff who understand how to engage unsheltered individuals, build trust, and connect people to appropriate housing and supports.

Question 3.2: Unsheltered Homelessness Outreach

Foundations, Sustain & Continuous Improvement Tool

To truly end homelessness, your community must ensure that you are including people experiencing unsheltered homelessness on your BND. Outreach should be available throughout your entire geography and is most effective when coordinated and documented. To ensure complete coverage and avoid unnecessary duplication, outreach teams should coordinate to understand where and when each other is working. Documentation of your coordinated outreach may include a wall map, written schedule, or other proof of a coordinated outreach structure.

Outreach should be designed to ensure that people experiencing unsheltered homelessness within the entire community will be identified and engaged. Outreach coverage does not mean that outreach workers cover every square mile within your geography every week. Rather, it means there are systems, partnerships and capacity in place to deploy outreach teams where they are needed and to re-assess geographical coverage as necessary to respond to new developments within the community.

The regularity of outreach and street engagement should reflect the unique nature of the community's geography and resources. Outreach may be more frequent in "hot spots" with high concentration of individuals experiencing homelessness and less intense in, for example, rural or mountainous regions. The regularity of outreach and who completes outreach will be reflective of community resources. While some communities may have homeless-specific outreach teams other communities may not. Work with what resources are available and lean on other community services such as by-law, police, ambulance, and other outreach services. Stay on top of hot spot areas and get out to those areas as often as possible. Outreach needs to happen frequently enough so that you can be confident that the BND is capturing people experiencing unsheltered homelessness in the community.



Tips & Resources: Unsheltered Homelessness

- Use the [Outreach Coverage and Coordination Tool](#) included in the Scorecards and Tools Workbook to map mobile providers encountering people experiencing unsheltered homelessness to ensure effective community coverage, coordination, and data entry. There is also space to identify unsheltered homelessness hotspots and to further explain how your community is coordinating its response to unsheltered homelessness and encampments, along with identifying any gaps and next steps and areas for improvement.
- See the [Street Outreach](#) page on BFZ-C website under “Program Areas” for guides, tools and community examples.
- Access encampment resources and support through [Encampment Response Services](#).
- Question 3.2 - aim for 90%+ geographic coverage of your outreach is clearly mapped out, informed by your data, and regularly assessed to ensure you are able to reach all unsheltered individuals in your community. Strategies may include:
 - Processes in place for the general public to respond to issues of unsheltered homelessness (e.g., 24/7 hotline that outreach teams may use to help connect and reconnect with experiencing unsheltered homelessness).
 - Outreach has availability to engage outside of regular business hours (e.g., evening, weekends, early mornings).
 - Outlying (non-hotspot) areas are being checked and documented/mapped at least once every three months (e.g., some communities have used technology such as drones to assess tree covered areas for temporary structures to ensure outreach services are deployed).
 - Utilize peer workers who would be most familiar with locations people frequent to assist in obtaining full coverage.
 - Use technology such as GPS/geo mapping to document activity and ensure locations receive outreach support.
 - Coordinated efforts to respond to unsheltered homelessness/encampments is documented in policies/protocols.
- Consider whether your community aligns with these statements:
 - Outreach services are housing focused. Outreach services are a set of proactive, community-based activities aimed at engaging individuals experiencing



homelessness. The goal is to connect with individuals outside of traditional in-services at set locations. The objective is to engage and offer housing and assist with activities to get individuals to accept and move into housing. Progressive engagement is usually a skill employed to continuously engage and offer housing each time an option becomes available, despite previous refusals.

- Responses to unsheltered homelessness and encampments are consistent with the right to housing, the Canadian Charter of Rights and Freedoms, and the United Nations Declaration on the Rights of Indigenous Peoples, while never losing sight of permanent housing being at the core of those rights.
- Unsheltered individuals are encouraged to actively participate in decision-making in their housing plans and other matters that pertain to them (e.g. storage of belongings, accessing resources).

HIFIS 4 Tips & Tricks: Unsheltered Homelessness

- Outreach services should be set-up in HIFIS as HIFIS Service Providers (see section 1) to be able to fulfill their role. As HIFIS is web-based, outreach teams can add new clients or update existing ones in the field via a mobile device.
- HIFIS 4.0.60.1 includes some enhancements related to outreach. There is a new Encampments module which allows communities to plot the locations of encampments. Additionally, when providing a Goods & Services record, the location the service was provided at can be plotted on a map. See <https://homelessnesslearninghub.ca/library/resources/hifis-release-4-0-60-1-reference-guide/> for more details.
- HIFIS can track which clients are in which living situation, including unsheltered, via Housing History. In the Housing History, HIFIS users can record the past and current living situation of the client. HIFIS considers the following housing types as unsheltered: Abandoned Building; Encampment / Campsite; Makeshift / Street; or Vehicle. When a client has one of these housing types, the client is assigned a status of “Homeless” automatically, and days accumulated with these housing types count towards the assessment of a client’s chronicity.
 - If needed, a HIFIS administrator can modify the housing types to better reflect the community. For more information on the Reaching Home Continuum and Housing Types in HIFIS, consult the [Homelessness Glossary for Communities](#) Annex C and D.



- The Coordinated Access module's Unique Identifier List (also known as BND) includes a column for "Last Known Housing," which can be used to identify and prioritize clients who are unsheltered.

Part 2: Data Quality

4. Comprehensiveness

Questions in the By-Name Data Scorecard 4.0

4. **Comprehensiveness**

Question	Foundations	Veteran	Sustain & Continuous Improvement
4.1 Does the dataset include people currently experiencing homelessness that have interacted with the homelessness response system? (e.g., are there one or more pathways for people to be added to the dataset from these situations)	☐ Unsheltered ☐ Emergency sheltered ☐ Hidden homelessness (+)	☐ All people are asked if they have military/RCMP service (not whether they are a Veteran) ☐ Service providers have been trained to ask questions related to Veteran status	☐ People fleeing domestic violence ☐ Refugee/Asylum Seekers
4.2 Does the dataset include people who have provided consent even if they have not yet completed a full intake or assessment? (if using HIFIS, check this box)	☐ Yes (+)	--	☐ Aggregate dataset includes all (e.g., if using HIFIS, this includes the explicit level of consent - not just CA level of consent).
4.3 Does the dataset include the following household types?	☐ Single adults ☐ Unaccompanied youth ☐ Families	☐ Veteran single adults ☐ Veteran youth ☐ Veteran families	--
4.4 Does the dataset include everyone currently experiencing homelessness that has interacted with the homeless-response system, as much as possible right now? (e.g., at least 90%+ of sheltered and unsheltered people are included in the dataset)	☐ Yes (+)	☐ Yes, for Veterans	☐ Have a documented policy/protocol for how the community tracks people actively experiencing homelessness who have not consented to services and/or assessment at this time
Points earned:	0	0	0



Additional Details: Comprehensiveness

Selecting all categories above means your community has taken sufficient measures to ensure that every known individual is accounted for and that your BND is comprehensive. To use your community's BND as the vehicle for measuring progress toward functional zero, the BND must account for all known households actively experiencing homelessness, even if they are refusing services or have not yet consented to a full assessment.

Question 4.1: Included in the Datasets

Foundations

Scorecard Question 4.1 Alignment with Reaching Home

This question aligns with [Outcome-Based Approach Minimum Requirements 7](#).

- This question ensures that you are not excluding data from any of these locations on your BND (e.g., a BND that only captures emergency sheltered and unsheltered individuals but not those who are experiencing hidden homelessness).
- It asks you to establish pathways to receive data for your BND from each of these locations.
- Your initial goal is to have “at least some but not necessarily all” people from each location. Your ultimate goal is to have confidence that you are capturing 90% or more of adults, youth and families experiencing homelessness (who are known and consenting).
- Create a list with two columns. In the first column, list service providers contributing data to the BND. In the second column, indicate the types of locations (listed above in checkmark boxes) that each agency reaches.
- Make a plan to strategically engage partners who will cover the locations you need and contribute data to the BND.
 - For unsheltered people, consider agencies who do outreach or come into contact with people who are unsheltered.
 - For shelters, if the shelter cannot contribute data immediately, consider a participating provider or staff person that can perform in-reach at the shelter.
 - For hidden-homelessness, consider drop-in and meal programs, social assistance and others that may serve people experiencing homelessness who are couch surfing or provisionally accommodated and not necessarily connecting



with other parts of the homeless-serving system. You are not expected to find everyone who is experiencing hidden homelessness, but you must include them when they come into contact with the system in some way. Continue to develop further pathways to add people experiencing hidden homelessness over time.

Veterans

- To ensure accurate data for ending veteran homelessness, communities must go beyond a self-report of veteran status and confirm veteran status. People should be asked about their military or RCMP service or participation in basic training, rather than directly asking if they identify as a Veteran.
- Include veteran questions as part of the community's common intake process: "Have you served in the Canadian or Allied Armed Forces or participated in basic training? Are you a former member of the RCMP?" If yes, they would generally be considered a veteran. Front line staff may also use prompts to help identify veterans such as "Have you ever worn a uniform for your country?" HIFIS includes the following values: Veteran - Canadian Armed Forces, Not a Veteran, Unknown / Not Asked, Former RCMP.
- For further tips on how to ask the Veteran question to support training, refer to the [Veteran Homelessness Community Guide](#).

Sustain & Continuous Improvement

- Communities should be identifying any other pathways from the broader service system where people are considered homeless that would improve your data. In the BND Scorecard 4.0, we identified Domestic Violence Shelters and Refugee/Asylum Seekers as some key ones for consideration. See the BFZ-C [Partnering with Other Systems](#) page, under the drop-down "Domestic Violence and Human Trafficking" for further information and resources on how to work together with these systems.

Question 4.2: Track Without Assessment

Foundations

- Your community may use common questions, a common triage and/or assessment tools as part of the HMIS/HIFIS/BND addition or intake process. If you are not able to complete these tools when first encountering someone experiencing homelessness, you should still add them to your BND as long as they have provided consent. You can follow up with them later to collect the outstanding information.
- Determine the minimum amount of information necessary to add someone who has consented to your HMIS/HIFIS/BND.



Question 4.3: Adults, Youth, Families

Foundations, Veteran

Scorecard Question 4.3 Alignment with Reaching Home

This question aligns with [Outcome-Based Approach Minimum Requirements 7](#).

- Your community determines how each of these populations are defined: e.g., adults (ages 19+) youth (unaccompanied youth ages 16-24) and families (e.g., couples and adults with dependent children).

Question 4.4: Data Set Includes Everyone

Foundations

Scorecard Question 4.4 Alignment with Reaching Home

This question aligns with [Outcome-Based Approach Minimum Requirements 7](#).

- While you are aiming to have 100% of people experiencing homelessness in the dataset, a good indicator is to ask whether you think you have at least 90% of known and consenting adults, youth and families.

Sustain & Continuous Improvement

- Like a Point-in-Time Count, each person should be accounted for, as long as there is reason to believe they are experiencing homelessness, and they have come into contact with the system in some way, without including personal identifying information that could be shared between agencies. If a community has a number of people who are not willing to provide informed consent, consider putting processes in place to include them in the aggregate total actively homeless count, such as getting an aggregate count from outreach teams. Do you have processes to continuously outreach to them to offer services and support and seek informed consent? As your community gets closer to functional zero, it will be important to understand this number to know if you have in fact reached functional zero.
- Determine how you will identify and include a count of people experiencing chronic homelessness that have not yet consented on the BND. Consider if it will be integrated or a separate “sidecar” list:



- Integrated: List each person anonymously on your BND without identifying information) (e.g., consider the type of information collected on the [PiT/Registry Week Tally Sheet](#)).
- Side-Car: Options may include having your coordinated outreach maintain their anonymous list (unduplicated to the degree possible) outside of the BND and just provide an overall count to the BND at least monthly.
- In both cases, continue the work you have started in BND Scorecard [Question #3, “Reach Unsheltered Homeless”](#) to coordinate as a community around continued outreach and engagement for people who have not provided informed consent.
- Determine who will be collecting this data.
- Determine how this data will be accounted for the BND.
- Determine how this data will be used. One use should be for aggregate reporting of actively homeless individuals.
- Apply a unique ID to these records to ensure quality assurance processes for de-duplication of records.
- Ensure the data collection process for people that have not yet consented is uniformly applied.
- Communities should take note of federal, provincial and local privacy legislation and guidelines as you develop your process. Please note that these legal considerations may factor into adjustments to the above decisions regarding what information will be collected, where the data will be stored and shared, and how the data will be used.

Veteran Tips & Resources: Comprehensiveness

- Review the [Veteran Homelessness Community Guide](#)
- Veterans experiencing homelessness may be reluctant to disclose their veteran status or may not define themselves as a veteran. Ask the question in a way that resonates with veterans to ensure you are confirming who amongst your homeless population has served. The following question about veteran status is recommended:
 - “Have you served in the Canadian or Allied Armed Forces or completed basic training? Are you a former member of the RCMP?” If yes, they would be considered a veteran for the purposes of BFZ-C.



- Ensure that the veteran status question above is a part of your intake process and recorded on the BND.
- On the BND, include the following fields for veteran status:
 - Veteran - Canadian Armed Forces
 - Veteran - Allies/Allied Forces
 - Veteran Civilian
 - Former RCMP
 - Not a Veteran
 - Unknown/not asked
 - Undecided/Decline to answer
- If an individual answers yes to: Veteran - Canadian Armed Forces (includes Reservists and Canadian Rangers); Veteran- Allies/Allied Forces; Veteran Civilian; or Former RCMP then they meet the criteria to be identified as a veteran.
- Ask the veteran question of anyone in the household, including youth 16 years of age or older (as youth can enlist with parental support as young as age 16 when involved in paid education programs).
- If you started a BND before you began asking the veteran question, go back to all those already added to the list and ask them the veteran question as well.

HIFIS 4 Tips & Tricks: Comprehensiveness

- The comprehensiveness of the Unique Identifier List in HIFIS is dependent on the amount of service providers that have on-boarded to HIFIS and the set-up / access rights to fulfill their role in BND and Coordinated Access.
- HIFIS mandatory fields include: First Name, Last Name, Date of Birth/Approximate Age, Gender, Veteran Status, Citizenship/Immigration Status, Racial Identity, and Indigenous Status. Communities may choose to make additional data fields mandatory.
- Clients in HIFIS are not required to have a completed assessment to be on the Unique Identifier List. The List includes data points related to assessment (VI-SPDAT, VAT, or SPDAT), that can help easily identify clients who have or have not completed assessments.
- Client files in HIFIS also include information on the client's Household Type (single, family), age, and veteran status.
- HIFIS does not include people who have not consented for you to collect their personal information. Make sure you write a policy covering what you do in your community to handle



known individuals that have not consented to be entered into HIFIS. If a client completely refuses to consent to you collecting their information, you cannot put their personal information into HIFIS.

- If a client is okay with you collecting their information, but not sharing it, you can enter them into HIFIS and indicate that their consent is ‘Declined - Anonymous’. However, this is essentially a “known” client who is not “consenting” to have their information beyond the service provider for which they are receiving service. This client will not appear in the Unique Identifier List.
- Hold a Connection and Action Sprint, alone or in combination with a Point-in-Time Count as the fastest way to kick-start a By-Name Data. See the [Connection and Action Sprint Toolkit](#).

5. Completeness

[Questions in the By-Name Data Scorecard 4.0](#)

5. **Completeness**

Question	Foundations	Veteran	Sustain & Continuous Improvement
5.1 Are processes in place to ensure that data for every person in the dataset is as complete as possible for: ▪ Interaction with the system ▪ Housing history ▪ Indigenous identity	☐ Yes ☐ Yes ☐ Yes	☐ Veteran status is confirmed (and this data is used for the count of total active Veteran homelessness)	☐ Community has a comprehensive policy/protocol for data input expectations and checking for data completeness. ☐ Community intentionally collects race and ethnicity data in the dataset (that respects the self-identification of clients)
5.2 Are processes in place to ensure that all relevant and necessary data for filling vacancies is complete for each person in the dataset? For example, is data used to determine if someone is eligible and can be prioritized for a vacancy, complete for each person in the dataset?	☐ Yes	--	☐ Information is included in the dataset regarding people's housing needs and preferences
Points earned:	0	0	0

Additional Details: Completeness

Question 5.1: Data Completeness

Foundations, Veteran, Sustain & Continuous Improvement Tool

Scorecard Questions 5.1 - 5.2 Alignment with Reaching Home

These questions align with [Outcome-Based Approach Minimum Requirements 8](#).



For Coordinated Access, communities must generate data for their Unique Identifier List using HIFIS (or existing, equivalent HMIS). Communities should implement processes to collect the necessary data across three key areas: interactions with the system, housing history, and Indigenous identity.

Understanding the number of people joining your BND as “first time homeless” (never having experienced homelessness before and coming directly from a housed situation) as opposed to those who are joining your BND with past experiences of homelessness, will support an understanding of the nature of homelessness in your community and inform prevention efforts. In HIFIS release 59 for example, “first time homeless”, as indicated by the use of any modules that makes a client “active”, can be distinguished by the date the client was created in HIFIS. The Unique Identifier List in HIFIS can be filtered by those with a first episode of homelessness.

Capturing race and ethnicity data is needed to understand disparity and disproportionality in the community’s homeless population and homeless-serving system.

Including other demographic, condition, or status information on the BND may be needed for matching and referral to specific housing resources in the community through Coordinated Access or to divert from the Coordinated Access process to more appropriate services in the community, such as specific services for mental health, addictions, developmental disabilities, head injury, etc. In addition, you may decide that it would be helpful for advocacy efforts. For example, your community may notice that many people experiencing homelessness have mental health/addictions issues but little or no resources exist for mental health or addictions. However, be clear about how you will use this additional information and consistently revisit how you are using it so you are not unnecessarily collecting data or losing sight of its connection to the goal of ending homelessness in your community.

Question 5.2: Data Submissions

Foundations, Sustain & Continuous Improvement Tool

Scorecard Questions 5.2 Alignment with Reaching Home

These questions align with [Outcome-Based Approach Minimum Requirements 8](#).

Processes must be in place to ensure that all relevant and necessary data for filling vacancies is complete (e.g., data used to determine if someone is eligible and can be prioritized for a vacancy is not missing from the dataset). These steps will ensure that data is complete, accurate, and used effectively for prioritizing housing placements, improving service delivery, and addressing disparities in homelessness.



Tips & Resources: Completeness

- Ensure the basic demographic data fields are included as part of your HMIS entry processes and/or common questions to add someone to the BND.
- Ensure you set up the BND such that it both includes the basic demographic data and that you can sort and filter this data (and/or ensure your HMIS reporting includes the ability to look at your data by various combinations of demographics, especially for chronic homelessness).
- Determine the data fields that need to be collected from clients to assess whether a person or family is experiencing chronic homelessness. To do this, a community should track the following fields at minimum:
 - Number of days/months homeless in past year
 - Number of days/months homeless in the past three years
 - Length of current homeless episode at time of assessment
 - Date of identification (date added to the list)
- Create a field on the BND that is formatted to indicate that a person is chronic at the time they meet the definition of chronicity, otherwise known as the time they “age-in” to chronicity. Where possible, this field should be set to automatically indicate that someone is chronic on their “aged-in” date, otherwise it will need to be manually updated.
- Identify manual or automated processes to identify and update other status changes such as youth to adult or single to family.
- Race and Ethnicity Data
 - Collect data on race and ethnicity. Ask an open-ended question to allow people to answer in their own words and then roll that data up to a list such as the one used in the [2021 Point in Time Count Survey](#)
 - [A Measurement Framework for Racial Equity in Homelessness Response Systems](#) (Community Solutions)
 - Review [Key Approaches](#) on this topic in the Coordinated Access Guide

Veteran Tips & Resources: Completeness

- To ensure accurate data for ending veteran homelessness, communities must go beyond a self-report of veteran status and confirm veteran status through Veteran Affairs Canada.



- Ensure your By Name Data has two veteran fields:
 - Veteran (yes/no/not declared)
 - Veteran Status Confirmed (yes/no/in progress)
- Select an agreed upon community process for confirming veteran status. It is recommended to assign one Homeless Response Provider or the Coordinated Access Lead to confirm veteran status for people who self-identified as a veteran on the BND.
- There are two ways to confirm veteran status. Communities may use the [Veteran Affairs Canada Process](#), or communities may work with a local veteran organization (e.g. the Royal Canadian Legion, VETS Canada) to confirm veteran status.
- Once veteran status is confirmed, record the confirmation on the BND. If the person is not considered a “veteran” remove the veteran status from the BND.
- Do not report veterans in data submission to BFZ-C until veteran status is confirmed.

HIFIS 4: Tips & Tricks: Completeness

- When creating a new client, gender, Indigenous status, Veteran status, and date of birth (age) of clients are all mandatory fields in HIFIS. Staff need to complete extra steps to record a person's family and chronic homelessness status, but it's worth it! It is also possible to record a person's family role (Family, under Client Information) and create family relationships. See [HIFIS User Guide](#) p.22 for instructions on how to create families and release 59.1 companion [Frequently Asked Questions](#) document for more information on how families are displayed on the Unique Identifier List.
- It is important to fill in a client's Housing History in HIFIS - this is where chronic status is calculated. Collect this data on intake, and every time a client returns from a period away from services. This information does not need to be detailed, HIFIS only requires a housing type (e.g. campsite, abandoned building, shelter, transitional housing, hospital), and a start date and an end date. HIFIS can calculate durations and episodes from this data.
- To collect additional information not captured by HIFIS default setup, such as race, ethnicity, or sexual orientation, communities can create HIFIS questionnaires or custom tables. For information on questionnaires, see the [HIFIS User Guide](#), p. 63.
- HIFIS release 59.1 generates a Unique Identifier List based on HIFIS client data. The Unique Identifier List in HIFIS contains population data points, including gender identity, age, Indigenous status, Veteran status, household type (single, youth, family, family head), chronically homeless (Y/N), first homeless episode (Y/N) and many others. It is therefore



easy to conduct multifactor analysis or identify clients with intersecting identities visually or via sorting and filtering.

- The Unique Identifier List in HIFIS is always generated using the most recent information from a client's profile. Thus, changes to client profiles regarding population change or Chronically Homeless Housing Status are always reflected in a newly generated Unique Identifier List. To support updated Lists, communities are encouraged to establish and communicate policies/protocols emphasizing data management expectations, including data entry.



6. Timeliness

Questions in the By-Name Data Scorecard 4.0

6. Timeliness

Question	Foundations	Veteran	Sustain & Continuous Improvement
6.1 Is the database updated as soon as new information is available about a person for: - Interaction with the system (e.g., changes from “active” to “inactive”) - Housing history (e.g., changes from “homeless” to “housed”) - Data that is relevant and necessary for Coordinated Access (e.g., data used to determine who is eligible and can be prioritized for a vacancy)	☐ Yes ☐ Yes ☐ Yes	--	☐ Community has a comprehensive policy/protocol regarding timely data entry/submissions (e.g. shelter bookings/bookouts and all new system intakes ASAP but within 0-24 hours and all other updates ASAP but within 7 days or 24 hours before case conferencing meetings)
6.2 Is data readily available and accessible, so that it can be used at the person-level (for Coordinated Access), and at the system-level (e.g., for the Outcomes-Based Approach) to drive the prevention and reduction of homelessness more broadly?	☐ Yes	--	--
Points earned:	0	0	0

Additional Details: Timely and Accurate Data

Question 6.1: Data Timeliness

Foundations, Sustain & Continuous Improvement

Scorecard Question 6.1 Alignment with Reaching Home

This question aligns with [Outcome-Based Approach Minimum Requirements 6](#).

The BND should be updated in as close to real-time as possible with updates occurring at least monthly. Creating clear timelines and processes for keeping the BND up-to-date and accurate will ensure your community has confidence in your data for decision-making and monitoring progress. Documenting these expectations in guidelines/policies/procedures helps promote clarity on expectations, especially when there is a lot of change in the community and/or staff turnover. Using an HMIS like HIFIS is beneficial since the Unique Identifier List can be updated in real-time based on data entry or transactions, however, communities must still ensure there are specific guidelines or policies for HIFIS users to input data after connecting with a client.



Question 6.2: Data Submissions

Foundations

Scorecard Question 6.2 Alignment with Reaching Home

This question aligns with [Outcome-Based Approach Minimum Requirements 9](#).

Reaching Home communities are expected to actively improve the quality of their datasets and demonstrate how they use data to drive decision-making and inform action.

Communities should use their data in a range of ways, including policy development, program planning, performance management, investment strategies, and service delivery improvements. For example, a community might analyze data trends to adjust outreach efforts, refine housing programs, or allocate resources more effectively.

Making data accessible and available is also key. One example is maintaining a regularly updated community dashboard that displays key metrics like total homelessness, inflow and outflow numbers, and trends over time. Some communities use interactive maps to track hotspots for unsheltered homelessness, helping outreach teams deploy resources more effectively. Others share regular data reports with service providers to coordinate responses and improve system efficiency.

Tips & Resources: Timely and Accurate Data

- See [Timely and Accurate Update Policy Template](#) - fill in the blanks (Word)
- Determine how often updates should be made and the process for updates. It is helpful to engage your community in this decision to create greater buy-in.
- Assign each person on your BND to a worker or agency in your community. That person or agency is responsible for updating the record. If you can't do this for everyone on your list, start with the people who are the highest priority in your community.
- Examples of how communities up-date their BND:
 - BND is reviewed at weekly, bi-monthly, or monthly meetings and updates are recorded at that time, but this approach can be time consuming.



- Pick a day of the week or month that all workers must ensure that data is updated on the BND or in the Homelessness Management Information System (HMIS) or database if the BND is populated through data stored in the HMIS.
- Providers are asked to complete an “update form” either immediately as changes are known, by a certain day each week or by a certain date before your next meeting. Some ideas for update forms could be a Google Form, Survey Monkey, secure SharePoint document, fillable PDF, Word document or an Excel sheet with the people from the BND so assigned staff can make highlighted changes to the client information. If you are using HIFIS 4/HMIS to populate the BND, changes can be made directly into the database.
- Update forms could be hand-delivered at a meeting and/or sent by email, fax, or portal. Consider how this information will be kept secure. For example, use their unique identifier, a password protected document, and/or a secure portal.
- Examples of how communities ensure accuracy of their BND:
 - The BND administrator balances the data each month. You can use this [By-Name Data Data Reliability Tool](#) which includes data balancing tips on the first tab and an interactive tool on the second tab to determine if your data is balanced and reliable.
 - For communities that use HIFIS release 59, using the [ACRE HIFIS 4 monthly/inflow report](#) to pull and display monthly data on chronic homelessness month over month can help keep a pulse on whether HIFIS users are inputting their data in a timely and accurate manner.
 - The BND administrator checks for repeat entries using the unique identifier.
 - The BND administrator creates a BND data dashboard and shares it regularly electronically or during meetings so that others can help verify the data.
 - Monthly data cleans (or more frequent!) where your community goes through entry by entry making sure everything makes sense and is up to date.

HIFIS 4: Tips & Tricks: Timely and Accurate Data

- The timeliness and accuracy of the Unique Identifier List in HIFIS is dependent on how service providers are set up, but also on what, how, and when information is entered in HIFIS. Best practices for data-driven communities include:



- Establishing and communicating policies/protocols emphasizing the expectation of timely data entry, in order to support HIFIS real-time data.
 - The auditing features in HIFIS 4 can allow supervisors to monitor the timeliness of the data entry of their employees. The auditing feature is under the Administration >Users >User Account. The Activity Log is one of the tabs on the User Account page.
- Establishing and communicating policies/protocols emphasizing other data management expectations to ensure greater consistency in the use of HIFIS across all users (e.g., identifying which data fields are mandatory or optional and why; how each data field and drop-down option is defined; and how to input data into the system).
- Providing continuous training and coaching to users, to build HIFIS users' general data literacy and reinforce expected data management practices.
- Built for Zero Canada and ACRE Consulting developed the free [HIFIS Health Check](#), a high-level view of your database with one key principle in mind: the better the data going in to HIFIS, the better the data will be coming out, which will result in HIFIS having greater value to the community, which will result in people wanting to use it more frequently, which means you will have better data going in, even better data coming out, and even more value to the community.
- HIFIS includes some limited auditing options. Aside from the Activity Log, any auditing tasks require the use of a report.
 - Any HIFIS official reports will be found in Reports Manager > HIFIS Reports. At the time of writing, the following reports may be useful for auditing:
 - Audit Log - All Activity
 - Audit Log - Client Activity
 - Audit Log - User Activity
 - Clients Approaching Inactivity
 - Clients with Explicit Consent Only
 - Recent Inactivity



- Communities can also create their own reports to assist with auditing. These would be found in Reports Manager > Custom Reports.
- Also check [ACRE Consulting's website](#) for reports that can be used to assist with data quality auditing.



7. Uniqueness

Questions in the By-Name Data Scorecard 4.0

7. **Uniqueness**

Question	Foundations	Veteran	Sustain & Continuous Improvement
7.1 Does your person-specific data in your HMIS/HIFIS or data system include a unique identifier? (If using a HMIS/HIFIS, check this box)	☐ Yes (+)	--	--
7.2 Do people appear only once in the dataset?	☐ Yes	--	☐ Documented process in place to review for duplications
7.3 Do people give their consent to be included in the dataset?	☐ Yes	--	☐ If using HIFIS, "Enforce Consent" is turned on ☐ If using HIFIS, 90%+ of active homeless in your dataset have CA consent ☐ N/A (not using HIFIS)
Points earned:	0	0	0

Additional Details: Uniqueness

Question 7.1: Unique Identifier

Foundations

Duplicate client records result in inaccurate accounting of the number of individuals experiencing homelessness on the By-Name Data (BND), so it is critical that you use some type of unique identifier, particularly in instances when the Homelessness Management Information System (HMIS), such as HIFIS, is not used to populate or manage the BND (Reaching Home Designated Communities are required to use HIFIS for CA unless an equivalent HMIS was already in place when the program launched in April 2019). A unique identifier also enables you to share list data while protecting client privacy and to facilitate coordination between the HMIS and the BND (where the BND is held outside of the HMIS).

Question 7.2: Data Uniqueness

Foundations

Scorecard Question 7.2 Alignment with Reaching Home

This question aligns with [OBA Minimum Requirements 5](#).



Duplicate client records result in inaccurate accounting of the number of individuals experiencing homelessness on the By-Name Data (BND), so it is critical that you use some type of unique identifier, particularly in instances when the Homelessness Management Information System (HMIS), such as HIFIS, is not used to populate or manage the BND (Reaching Home Designated Communities are required to use HIFIS for CA unless an equivalent HMIS was already in place when the program launched in April 2019). A unique identifier also enables you to share list data while protecting client privacy and to facilitate coordination between the HMIS and the BND (where the BND is held outside of the HMIS).

In HIFIS, client state and housing history help determine a person's status and ensure the dataset remains unduplicated. These two factors are essential for accurate tracking.

Data consistency is also crucial. This means using a single, reliable source of truth—like HIFIS—for different purposes without modifying the original data. For example, when extracting data from HIFIS to fill a vacancy, you generate a unique identifier list, then filter and sort it as needed. However, the extracted Excel list should not be altered manually to maintain accuracy and reliability. If new information becomes available about someone's housing history, it should always be updated directly in HIFIS/HMIS. This ensures that the system remains the most accurate and complete source of truth for homelessness data.

Question 7.3: Data Consent

Foundations

Scorecard Question 7.3 Alignment with Reaching Home

This question aligns with [OBA Minimum Requirements 5](#).

Ensuring that individuals give their consent to be included in the dataset is very crucial. If your community uses HIFIS, the "Enforce Consent" feature should be enabled to ensure that only individuals who have provided explicit consent are included. A strong dataset should also reflect that a large percentage of individuals experiencing homelessness have provided CA consent. If your community does not use HIFIS, a similar system should be in place to document and track consent.

For example, a community might implement a standardized consent form that is reviewed with individuals during intake and updated regularly. Staff can be trained to explain what consent means, why it matters, and how people can update or withdraw their consent if needed.



Tips & Resources: Uniqueness

- Ensure that the BND has a field for a unique Identifier (ID).
- If a community is already using an HMIS, align the unique ID with the HMIS. If not using an HMIS, determine if there is already another unique ID system that can be applied to all providers for the BND.
- If there is no system for assigning a unique ID, communities can determine how unique IDs will be generated (a series of numbers and letters). For example, communities have used:
 - Referring agency initial, year, and number chronologically added to BND e.g., HM202101
 - Last letter of first name and last two letters of last name plus last two digits of year of birth e.g., SAN71
 - Point-in Time Count system e.g. John Smith 1991 becomes JOSM91
- Consider if there is a way to generate a unique ID when a client is added to the BND. If you cannot program the BND to automatically generate that unique ID for those who are newly added to the BND, then ensure that there is a quality assurance process for having a Lead role responsible for creating a unique ID when people or families are added to the BND.
- Use unique IDs to de-duplicate the BND at regular, predetermined intervals.
- Homelessness Learning Hub - [Using HIFIS to Create a Unique Identifier List](#)

HIFIS 4 Tips & Tricks: Uniqueness

- HIFIS 4 generates a unique Client ID for each client - no additional steps are required.
- With HIFIS release 59.1, the Unique Identifier List generated in the Coordinated Access module displays the unique identifier under the *Client ID* column. The Coordinated Access module also allows the List to be exported with or without client names. For the latter, the List includes the *Client ID* as the sole unique identifier.
- You can, additionally, turn on a setting to “Use Default File Numbers” (in Administration → Application Settings) to automatically generate a unique file number for each client. The file number generated is based on the Client ID, but it’s easier for staff to reference.
- The Unique Identifier List in HIFIS is always generated using the most recent information from a client’s profile. Thus, changes to client profiles regarding population change or Chronically Homeless Housing Status are always reflected in a newly generated Unique Identifier List. To support updated Lists, communities are encouraged to establish and



communicate policies/protocols emphasizing data management expectations, including data entry.

Part 3: Data Infrastructure

8. Inactivity

Questions in the By-Name Data Scorecard 4.0

8. **Inactivity**

Question	Reaching Home	Veteran	Sustain & Continuous Improvement
8.1 Is there a written policy/protocol ("Inactivity Policy") that describes how interaction with the homeless-serving system is documented (as per the Documentation Checklist #15)? <i>Note: The timeline for moved to inactive can't be longer than 90 days but can be shorter (fixed at 90 days in HIFIS).</i>	☐ Yes	--	☐ The policy/protocol includes protocols that allow for changing an individual's status to inactive prior to reaching the number of days in the inactive threshold if there is evidence that the individual is no longer considered actively homeless in the community
8.2 Has this policy/protocol been implemented across the system?	☐ Yes (+)	--	☐ Breakdown and review inactivity categories (as in note)
Points earned:	0	0	0

Additional Details: Inactivity Policy

Question 8.1: Inactivity

Foundations, Sustain & Continuous Improvement

Scorecard Question 8.1 Alignment with Reaching Home

This question aligns with [Outcome-Based Approach Minimum Requirements 3](#).

There are times when people experiencing homelessness on the By-Name Data (BND) cannot be located. Instead of removing them from the BND, establish an inactive threshold, such that after a defined period of time without contact, a person's status is changed and they are moved to an "inactive" status on the list or database. This status allows you to easily move "inactive" people back to the "active" part of the BND if they reconnect with the homeless response system again but does not skew the number of people actively experiencing homelessness or divert outreach and engagement activities.



For the sustain & continuous improvement requirement, communities should have a written inactivity protocol that provides clear guidance on tracking housing history and best practices. The key question is whether the person is currently active and experiencing homelessness.

Tips & Resources: Inactivity Policy

- See the following resources:
 - Inactivity Policy – [Recording](#) (15 min) and [Presentation](#)
 - [Inactivity Policy – Key Considerations and Examples](#) (PDF)
 - [Inactivity Policy Template](#) - fill in the blanks (Word)

HIFIS 4 Tips & Tricks: Inactivity Policy

- In HIFIS version 4.0.59.1 or higher, clients automatically become Inactive if they haven't had any transactions in their client file for a set number of days. HIFIS Administrators can configure their local inactivity policy in HIFIS by setting the number of days that would trigger an inactive state.
- The HIFIS Inactivity Threshold is found under cluster settings (Administration – Application Settings). The list of transactions that count towards activity can be found in the *Service Table – Transactions Making Client Active (Table 1 – Service Table)* in the [HIFIS Release 4.0.59.1 Reference Guide](#).
 - In HIFIS version 4.0.60.4, the Inactivity Threshold is locked at 90 days and can no longer be changed.
- When an inactive client receives a transaction, the client file is automatically reactivated.
- Clients can also be manually set to Deceased or Archived, if applicable.
- What constitutes activity in HIFIS has been amended multiple times in recent years. We recommend that you be aware of how activity is defined for your version specifically, as it may be different from other communities. Check the release notes, version guide, or FAQ for your HIFIS version. You can also check ACRE Consulting's blog <https://www.acreconsulting.ca/blog/100479-activity-and-inactivity>



9. Homelessness Inflow

Questions in the By-Name Data Scorecard 4.0

9. Homelessness Inflow

Question	Foundations	Veteran	Sustain & Continuous Improvement
9.1 Does the community dataset include the following three data points with date stamps representing "inflow" into homelessness that can be displayed and/or extracted? - Newly identified - Returns from housing - Returns from inactive <i>(if using HIFIS, check these boxes if consistently adding housing history records corresponding to where the client was prior to the change in status)</i>	☐ Yes (+) ☐ Yes (+) ☐ Yes (+)	--	☐ Newly identified chronic homelessness data can be broken out by "aged in" and "newly added" ☐ Capture whether "first time" homeless
9.2 Does the dataset include information about where people were immediately before they became homeless? - Hospital, inpatient facility, or residential rehabilitation - Corrections/justice/prison - Child protection <i>(same HIFIS comment as above in #9.1)</i>	☐ Yes (+) ☐ Yes (+) ☐ Yes (+)	--	--
Points earned:	0	0	0

Additional Details: Homelessness Inflow

Question 9.1: Inflow

Foundations

It is critical for the BND to include inflow data to assess system capacity to house people and families entering into homelessness every month. Additionally, without data on inflow, it becomes impossible to make informed projections about when your community will reach functional zero chronic homelessness.

Sustain & Continuous Improvement

Newly identified chronic homelessness data can be broken out by:

- those who "aged-into chronic" while on the BND, as they did not meet the chronic definition when they were newly identified/added, but overtime have met or "aged-in" to the threshold of chronicity, and
- those who were "newly added" to the BND as chronic or who presented as experiencing chronic homelessness from the first point of entry.



This Scorecard item is achieved when you can pull and submit “aged-into chronic” data separately from chronic “newly identified” data, on a monthly basis. For further information on “aged-in:”, refer to Question 7.2.

Tips & Resources: Homelessness Inflow

Newly Identified

- For further information, refer to Tab 2 of the [CAEH BND Data Reliability Tool](#).
- Determine if your form or process to add people to the BND includes a date. If not, add this question to the intake form or process.
- Ensure that your process for tracking people experiencing homelessness who do not consent to a full assessment, includes collecting the date when the person was identified.
- Create a field on the BND for the date added to BND that is separate from the date of assessment.
- Use the date added field to sort or filter the BND to obtain a list of people that have been newly added to the list for the reporting month.
- Cross reference this filtered list with the rest of the BND to determine if the person or family is already on the BND and has a unique ID.
- If there are duplicate records, reconcile these duplicates so there is just one record per client on the BND.

Returns to List (from housing or inactive)

- For further information, refer to Tab 2 of the [CAEH BND Data Reliability Tool](#).
- If this person is already on the BND, ensure you can edit their record and change their status from ‘housed’ to ‘homeless’ or ‘inactive’ to ‘active’.
- Record the date of this status change so that when you report your monthly measures, this person is included in your actively homeless number.

HIFIS 4 Tips & Tricks: Homelessness Inflow

- The Unique Identifier List in HIFIS identifies client inflow with the following “Yes/No” data points: First Homeless Episode; New Client in 30 Days; Returned from Housing; Returned from Inactive. The Unique Identifier List can also be sorted directly in HIFIS using these data points as filters.



- The Unique Identifier List in HIFIS also includes information on “days homeless in the past year” and “days homeless in the past three years”. These data points can help identify clients who are about to age-in to chronicity or have just aged in (chronic threshold is homeless at least 180 days over past year or 546 over the past three years).
- Ensuring that clients’ Housing History is comprehensive and up-to-date will help ensure data points are accurate.
- HIFIS only knows the data that is entered into the system. If a client leaves a shelter and does not tell staff where they are going (or perhaps they tell a staff member who doesn’t update their client file), HIFIS treats their housing status as “Unknown.” Eventually, if the client is not seen, they will become inactive. To get the best data out of HIFIS, make sure HIFIS users are diligent in keeping the Housing History up to date - including after a client is no longer being served.
- To support communities with their Reaching Home Community Homelessness Report, which includes reporting on annual inflow/outflow, a HIFIS report exists to pull these data points using Housing History and inactivity information.
<https://homelessnesslearninghub.ca/library/resources/community-homelessness-report-hifis-report/>
- ACRE Consulting has completed the development of an official [HIFIS 4 monthly inflow/outflow report](#) to pull and display monthly inflow/outflow data on chronic homelessness. More specifically, the report displays people actively experiencing chronic homelessness, aged-in, newly identified, returned from inactive, returned from housed, moved to inactive, and moved to housed - all for a single cluster for a specified month. The report requires HIFIS Version 4.0.59.1 or higher.



10. Housing Status and Outflow

Questions in the By-Name Data Scorecard 4.0

10. Housing Status & Outflow

Question	Foundations	Veteran	Sustain & Continuous Improvement
10.1 Does the community dataset include housing status (e.g., homeless or housed) that can be displayed and/or extracted? <i>(if using HIFIS, check this box)</i>	☐ Yes (+)	--	--
10.2 Does the community dataset include the following two data points with date stamps representing "outflow" from homelessness that can be displayed and/or extracted? - Housing move-ins - Moved to inactive (as per inactivity policy) <i>(if using HIFIS, check these boxes for Foundations)</i>	☐ Yes (+) ☐ Yes (+)	--	☐ Capture whether people moved to housing on their own vs. through Coordinated Access match
10.3 Is there a written policy/protocol that describes how housing history is documented (e.g., as part of a broader data entry guide for the HMIS)? The policy/protocol must: - Define what it means to be "homeless" or "housed" (e.g., define a housing continuum that shows which housing types align with a status of "homeless" versus "housed") - Explain how to enter housing history consistently - Explain how to check for data quality (e.g., run a report that shows the percentage of clients that have complete housing history, so that "unknown" fields can be updated) <i>(see also Documentation Checklist #16)</i>	☐ Yes ☐ Yes ☐ Yes	--	--
Points earned:	0	0	0

Additional Details: Housing Status and Outflow

Question 10.1 & 10.2: Outflow

Foundations

Housing status fields should include at minimum experiencing homelessness as well as the two status' that represent your monthly outflow - those who move into permanent housing ("housing move-ins") and those who become inactive, per your inactive policy ("moved to inactive"). This data is essential for understanding your rate of outflow and total active homeless.

Sustain & Continuous Improvement

- Your policy should clearly explain what counts as "homeless" versus "housed." For example, a person living in an emergency shelter or sleeping rough (outside) would count as homeless. Someone in stable, permanent housing (like a rented apartment or



owned home) would count as housed. Transitional housing or couch-surfing may fall into a grey area, so your policy should clarify where these situations fit.

- This definition helps staff across your community understand how to classify someone's housing status correctly.
- Your policy must include step-by-step instructions for entering housing history in your system. This ensures everyone is recording data the same way, no matter who they are or what program they work in.
- If someone has moved between shelters or been evicted from housing, the policy should guide staff on how to document these transitions. Record the dates of each housing change.

Question 10.3: Housing History Documentation

Foundations

Scorecard Question 10.3 Alignment with Reaching Home

This question aligns with [Outcome-Based Approach Minimum Requirements 4](#).

Your community should have a written policy or protocol that outlines how housing history is documented within your HMIS. This policy should define what it means for a client to be "homeless" or "housed," explain the procedures for consistently entering housing history, and detail methods for checking data quality.

For example, the policy might specify that "homeless" status includes individuals residing in emergency shelters, transitional housing, or places not meant for habitation, while "housed" status applies to those in permanent housing situations. It would also provide step-by-step instructions for entering housing history data into the HMIS to ensure uniformity across all users. Additionally, the policy should outline procedures for running regular reports to assess data completeness and accuracy, such as identifying and updating any "unknown" fields in clients' housing histories.

This should be recorded consistently for up-to-date client information.

Tips & Resources: Housing Status and Outflow

- For further information, refer to Tab 2 of the [CAEH BND Data Reliability Tool](#).
- Note two equally important requirements: (1) a status field, and (2) the ability to date-stamp each change in status (as further outlined in Question #10).
 - If the BND is self-contained inside other software, such as Excel, ensure that everyone's record includes a status field.



- If the BND pulls data from HIFIS/HMIS, you likely already have a status field.
- Ensure that the proper field is included in the BND template and data pull. Also ensure that the status field is populated with all the necessary options.
- Clarify what “housed” and “homeless” means in your community and how it applies in different situations so you know who to properly record this status field in your BND. If looking for guidance on definitions, refer to the [Functional Zero Q&A document](#).
- When considering definitions of homelessness, you should also consider the following situations, although not literally homeless, where people are in unsafe housing situations and lack adequate resources or support networks to obtain other permanent housing, to be considered as experiencing homelessness for the BND:
 - People fleeing or attempting to flee their home or the place they are staying because of:
 - Domestic violence including intimate partner or family abuse
 - Sexual assault
 - Stalking
 - Other dangerous or life-threatening conditions related to violence that has taken place in the home or made them afraid to return to the home, including:
 - Physical, sexual or psychological abuse
 - Trading sex for housing
 - Trafficking (drugs and/or sex)
 - High traffic of unknown visitors and/or use of violence or drugs while minor children are in the home
- Housing that is structurally unsafe/uninhabitable which can not be resolved in a timely manner (e.g., due to fire, flood, lack of doors or windows, lack of access to functioning bathroom facilities, mold, severe pest infestation, risk of collapse, etc.).

HIFIS 4 Tips & Tricks: Housing Status and Outflow

- HIFIS release 59.1 introduces a new field called Housing Status. This status uses data from a clients’ Housing History and Admissions / book-ins records to automatically assign one of five HIFIS Housing Statuses to each client (homeless, chronically homeless, transitional, housed, unknown). The history of Housing Status changes can be found in the Display Vitals History section of the Client Activity Log.
- Only clients who are not currently Housed (Housing Status: Homeless; Transitional; Public Institution; or Unknown) are included on the Unique Identifier List in HIFIS. Clients with a



Transitional or Public Institution Housing Status may or may not be included depending on local HIFIS configuration. See the [HIFIS 4.0.59.1 Reference Guide](#) for more information.

- Ensure that staff are updating the Housing History of clients. This is the best way to keep track of who is housed or experiencing homelessness, how long a person or family has been experiencing homelessness, and who is experiencing chronic homelessness.
- The best way to track permanent housing move-ins is through the Housing Placement module, which is designed for use by permanent housing staff such as case managers from Housing First and Rapid Re-Housing teams. Move-ins are also included in the Unique Identifier List export in HIFIS.
- To support communities with their Reaching Home Community Homelessness Report, which includes reporting on annual inflow/outflow, a HIFIS report exists to pull these data points using Housing History and inactivity information.
- ACRE Consulting has completed the development of an official [HIFIS 4 monthly inflow/outflow report](#) to pull and display monthly inflow/outflow data on chronic homelessness. More specifically, the report displays people actively experiencing chronic homelessness, aged-in, newly identified, returned from inactive, returned from housed, moved to inactive, and moved to housed - all for a single cluster for a specified month. The report requires HIFIS Version 4.0.59.1 or higher.



Part 4: Action & Quality Improvement

11. Meaningful Engagement with Indigenous Partners

Questions in the By-Name Data Scorecard 4.0

11. Meaningful Engagement with Indigenous Partners

Question	Foundations	Veteran	Sustain & Continuous Improvement
11.1 Is there meaningful collaboration between Indigenous and non-Indigenous partners related to the community data system (e.g., HMIS, HIFIS, other data system)	☐ Yes	--	--
11.2 Are processes in place that ensure there are no unnecessary barriers preventing Indigenous partners from accessing the HMIS data and/or reports they need to help the people they serve?	☐ Yes	--	--
11.3 Is there meaningful collaboration between Indigenous and non-Indigenous partners specific to the work of strengthening the Outcomes Based Approach?	☐ Yes	--	--
Points earned:	0	0	0

Additional Details: Meaningful Engagement with Indigenous Partners

Question 11.1:

Foundations

Scorecard Question 11.1 Alignment with Reaching Home

This question aligns with the [HIFIS Directive](#).

These new questions aim to get more information about some of the ways that collaboration with Indigenous partners on Coordinated Access, the Outcomes-Based Approach and the HMIS may be taking place at the community level.

Meaningful collaboration between Indigenous and non-Indigenous partners on systems like HIFIS/HMIS is essential for equitable and culturally responsive data management. These partnerships ensure that Indigenous perspectives and practices are integrated throughout the system's lifecycle, from implementation to ongoing improvement.

From the Reaching Home Community Homelessness Report Guide:



- Indigenous partners have roles and responsibilities related to governance for the HMIS/HIFIS throughout the lifecycle of these systems (implementation, maintenance, and improvement).
- The perspectives of Indigenous partners are integrated into the work of the HMIS/HIFIS.
- Indigenous partners use the HMIS and/or participate in the Outcomes-Based Approach.

Refer to section one of the [Reaching Home Community Homelessness Report Guide](#) for additional information.

Question 11.2:

Foundations

Scorecard Question 11.2 Alignment with Reaching Home

This question aligns with the [HIFIS MR 3](#).

To ensure Indigenous partners can access the HMIS data and reports they need, your community should have processes in place that remove unnecessary barriers. This includes establishing clear agreements on data access, respecting Indigenous Data Sovereignty principles, and ensuring Indigenous-led organizations can retrieve and use data relevant to the people they serve.

Also, training and support should be available to help Indigenous partners navigate the HMIS and use the data effectively for service planning and advocacy.

Question 11.3:

Foundations

Scorecard Question 11.3 Alignment with Reaching Home

This question aligns with the [Outcome-Based Approach MR 2](#).

Meaningful collaboration between Indigenous and non-Indigenous partners means working together in a way that respects Indigenous leadership, knowledge, and priorities while ensuring Indigenous communities have a voice in decision-making and data use.

A strong partnership might include co-developing data collection and reporting processes, ensuring Indigenous partners have access to the HMIS or other relevant data systems, and integrating culturally appropriate approaches into homelessness response efforts. Regular meetings, shared learning opportunities, and co-created strategies can help ensure this collaboration is active and impactful.



For example, a community could establish an Indigenous-led advisory group to guide homelessness reduction efforts, ensuring that Indigenous and non-Indigenous organizations are aligned in their approach to tracking and improving outcomes.

Tips & Resources: Meaningful Engagement with Indigenous Partners

- When planning meetings, give Indigenous leaders as much notice as possible and seek their input on how discussions should be structured and what should be included. Their guidance can ensure conversations are meaningful and culturally appropriate.
- Building relationships takes time. Focus on trust and connection. Relationship-building is at the heart of meaningful collaboration.
- Follow OCAP principles to respect Indigenous data sovereignty. These principles ensure Indigenous communities control their data and how it's used. Learn more through [The First Nations Information Governance Centre](#).



12. Data Use

Questions in the By-Name Data Scorecard 4.0

12. Data Use

Question	Foundations	Veteran	Sustain & Continuous Improvement
12.1 Has system-level data from the community dataset been used to set monthly and annual (when available) baselines and reduction targets for the following community-level outcomes? - Overall total homelessness? - Overall homelessness - newly identified - Overall homelessness - returns to homelessness - Indigenous homelessness - Chronic homelessness (see also Documentation Checklist #17)	☐ Yes ☐ Yes ☐ Yes ☐ Yes ☐ Yes	☐ Yes, for Veteran Homelessness (once other quality BND elements have been confirmed)	--
12.2 Is the dataset being used to track progress against reduction targets for the community-level outcomes above (12.1) by recording/displaying the following key system-level data points for the community monthly and annually? - Key inflow system-level data points: - Newly identified - Returned from housing - Returned from inactive - Key outflow system-level data points: - Housing move-ins - Moved to inactive - Total homelessness	☐ Yes (+) ☐ Yes ☐ Yes ☐ Yes (+) ☐ Yes (+) ☐ Yes (+) ☐ Yes		☐ BND can be sorted into process categories "buckets" to support Action Oriented Case Conferencing e.g.: - Triage/assessment completed - Required documentation completed to access housing - Matched to a housing resource - Referred and/or accepted a housing resource and/or moved into housing
12.3 Is the data (from 12.1 and 12.2 above) being used to inform action related to preventing and reducing homelessness? (see also Documentation Checklist #18)	☐ Yes		☐ Have reviewed and filled in BND Continuous Improvement Tool #10 on implementing activities consistent with Data Justice ☐ Have reviewed and filled in BND Continuous Improvement Tool #11-#12 on sharing and using data to make decisions
Points earned:	0	0	0

Additional Details: Data Use

Question 12.1: Data Targets

Foundations, Veteran



Scorecard Questions 12.1 Alignment with Reaching Home

This question aligns with [Outcome-Based Approach Minimum Requirements 8](#).

For your community to achieve specific foundational criteria, it has to have the ability to unlock meaningful and measurable targets for reducing homelessness. These criteria include having a centralized database like HMIS that houses person-specific data, ensuring the dataset reflects only individuals currently experiencing homelessness, including only those who have provided consent, and ensuring no duplicates exist. Meaning each individual or family appears just once in your dataset.

Setting these targets requires reliable and comprehensive data. For instance, tracking newly identified homelessness helps communities understand the inflow of individuals into the system, while monitoring returns to homelessness highlights the need for stronger housing retention strategies. Collecting data on specific populations, such as Indigenous peoples or those experiencing chronic homelessness, ensures communities can target interventions where they are most needed.

This process may align with reporting requirements, such as the Reaching Home Community Homelessness Report, the CAEH Foundations level confirmation, or your community's own processes.

Question 12.2: Track Progress

Foundations, Sustain & Continuous Improvement

Scorecard Questions 12.2 Alignment with Reaching Home

This question aligns with [OBA Minimum Requirements 8](#).

Tracking progress using system-level data is a fundamental part of an outcomes-based approach. While the framing of this question may be new, the expectation remains the same: communities need accurate baselines, clear reduction targets, and a way to measure progress over time.

To ensure the dataset is effectively tracking progress against reduction targets, it must consistently capture key system-level data points. Inflow data provides insight into how people are entering homelessness, including those who are newly identified, those returning from housing, and those re-engaging with services after a period of inactivity. Outflow data focuses on exits from homelessness, tracking housing move-ins and movements to inactive status. By monitoring total homelessness on a monthly and annual basis, communities can better



understand trends, evaluate their system’s effectiveness, and make data-informed decisions to drive reductions in homelessness.

To turn this data into action, communities can sort their BND into process categories or “buckets” to support Action-Oriented Case Conferencing. These categories include individuals who have completed triage and assessment, gathered necessary documentation for housing access, been matched to a resource, and those who have been referred or moved into housing.

Question 12.3:Active Data

Foundations, Sustain & Continuous Improvement

Scorecard Questions 12.3 Alignment with Reaching Home

This question aligns with [OBA Minimum Requirements 9](#).

This question focuses on how your community data is actively used to drive action in preventing and reducing homelessness. Communities should demonstrate how they analyze and apply system-level data to make informed decisions, adjust strategies, and improve service delivery.

For example, if data shows a high number of people returning to homelessness after a housing placement, the community might strengthen follow-up supports or adjust housing stability programs. If inflow data indicates an increase in youth homelessness, outreach efforts could shift to target youth-specific services. Similarly, if Indigenous homelessness is overrepresented, partnerships with Indigenous-led organizations can help develop culturally appropriate responses.

To track how data continues to improve local systems, communities should complete the BND Continuous Improvement Tool.

Tips & Resources: Data Use

- Refer to the [BND Continuous Improvement Tool](#) #10 - #12
- Improve how you engage with equity-deserving groups by learning inclusive and sensitive questioning practices. Explore resources like those available on the [Homelessness Learning Hub](#), such as materials for [LGBTQ2S+ inclusivity](#).
- Break down data to identify disparities among groups. Focus on measures like overall rates of homelessness, permanent housing exits, time to move-in, and returns to homelessness. After analysis, create actionable steps to address disparities. For guidance, refer to tools like the [National Alliance to End Homelessness Racial Equity Toolkit](#) (2019).



- Familiarize yourself with principles such as the [First Nations Principles of OCAP®](#) and the [Indigenous Knowledges and Data Governance Protocol](#) to ensure respectful and community-led data practices.
- Review tools like [“A Measurement Framework for Racial Equity in Homelessness Response Systems”](#) from Community Solutions, which offers a structured way to measure and improve racial equity in homelessness responses.
- Also see: [A Toolkit for Centering Racial Equity Within Data Integration](#), which provides strategies to ensure your data systems are equitable and inclusive.
- [Racial Equity and Coordinated Entry Flow Chart](#). This tool highlights points in the Coordinated Access process where inequities may occur.
- Present your community data in compelling ways using storytelling techniques.
 - Using Data to Tell a Story Webinar ([recording](#) and [PDF](#))
 - [Demystifying Data: Data Storytelling presentation](#).
 - [Service Coordination and Data Storytelling Tool](#)

13. Data Improvement

Questions in the By-Name Data Scorecard 4.0

13. Data Improvement

Question	Foundations	Veteran	Sustain & Continuous Improvement
13.1 Are efforts being made to improve data quality? (see also Documentation Checklist #19)	☐ Yes	☐ Yes	☐ Have reviewed and filled in BND Continuous Improvement Tool #7 and #8 on auditing data and undertaking improvement projects ☐ Have reviewed and filled in all of the BND Continuous Improvement Tool #1-#12
Points earned:	0	0	0

Additional Details: Data Improvement

Question 13.1: Data Improvement

Foundations, Veteran, Sustain & Continuous Improvement

Scorecard Questions 13.1 Alignment with Reaching Home

This question aligns with [Outcome-Based Approach Minimum Requirements 9](#).



Efforts to improve data quality should be ongoing and intentional, ensuring that the dataset accurately reflects homelessness in the community and supports effective decision-making. This includes regularly reviewing data for completeness, accuracy, and consistency, as well as identifying and addressing gaps.

Continuous improvement efforts could include training staff on data entry best practices, running regular data quality reports, and using the [BNL Continuous Improvement Tool](#) to track progress. Communities should aim for a system where data is actively used to refine outreach, enhance service coordination, and drive reductions in homelessness over time.

Tips & Resources: Data Improvement

For continuous data improvement, communities should consistently monitor their systems. Training, materials, and approaches must be in place to ensure By-Name Data (BND) and Coordinated Access (CA) processes are followed across the system by all staff, in alignment with local policies and protocols. This also includes fostering a culture of data-driven improvement and decision-making.

- New staff orientation & training is available on BND/CA and local processes (e.g., see [TTA website](#) for CAEH BND/CA courses and e-courses on the [Homelessness Learning Hub](#)).
- Consider what training is needed for system leads, organization leads, direct support staff, and other partners.
- Staff across the system understand the purpose and value of data entry, documentation, and shared data (see [OrgCode documentation video](#)).
- Continuous refreshers, training, and/or support materials are available for staff on BND/CA and local processes (e.g., meetings, newsletters, job aids, tip sheets, HIFIS bulletins).
- Relevant staff understand/have been trained on BND analysis (e.g., data points and definitions included in the [Data Reliability Tool](#), the [high/low method](#) of BND aggregate data analysis, and the use of [Run Charts](#)).
- Staff training is provided on Indigenous Data Sovereignty principles and practices (e.g., see [Indigenous Knowledges and Data Governance Protocol](#) and [First Nations Principles of OCAP](#)).
- Staff have been trained in or participated in quality improvement and/or using data for decision-making (e.g., through BFZ-C, [E-QiP](#), or [IHI](#)).

HIFIS 4: Tips & Tricks: Data Improvement

- HIFIS has some tools for data improvement, however, most likely communities will need to make use of custom reports to fulfill their data improvement needs.
- Clients with a missing Racial Identity display an alert on the client file.



- The client's Housing History is one of the most important data fields to be regularly collecting. If the Housing History has not been updated recently, HIFIS shows an alert to staff accessing the client file that the client's Housing History is out of date. Staff should be encouraged to update the Housing History when they see this alert. How frequently this alert appears can be managed under Cluster Settings (Housing Inactivity Threshold).
- Some (free and premium) data improvement reports are available from ACRE Consulting: <https://www.acreconsulting.ca/download-reports/>