

## BY-NAME LIST INTAKE CHECKLIST

### CONSENT\* - CONSENT MODULE

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- Client(s) has signed HIFIS/BNL Consent and Consent has been uploaded to HIFIS (**REQUIRED**)
- Consent Type: Coordinated Access & Explicit or Coordinated Access if Explicit Consent was signed at an earlier date
- Date Consent was signed

### CLIENT PERSONAL INFORMATION – CLIENT DETAILS MODULE

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- |   |   |
|---|---|
| <input type="checkbox"/> Full Name & Alias              | <input type="checkbox"/> Indigenous Status                        |
| <input type="checkbox"/> Date of Birth                  | <input type="checkbox"/> Geographic Region                        |
| <input type="checkbox"/> Gender Identity                | <input type="checkbox"/> Contact Information (phone, email, etc.) |
| <input type="checkbox"/> Veteran Status                 |   |
| <input type="checkbox"/> Citizenship/Immigration Status |   |

### CLIENT FAMILY INFORMATION – FAMILY MODULE\*\*

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- |   |  |
|---|--|
| <input type="checkbox"/> Family Member Name | <input type="checkbox"/> Relationship to Family Head |
| <input type="checkbox"/> Family Role        | <input type="checkbox"/> Start Date                  |

### INCOME- FINANCIAL PROFILE MODULE

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- |  |                                      |
|--|--------------------------------------|
| <input type="checkbox"/> Income Type     | <input type="checkbox"/> Hourly Wage |
| <input type="checkbox"/> Pay Frequency   | <input type="checkbox"/> Start Date  |
| <input type="checkbox"/> Hours Per Month |                                      |

**\*The Consent is mandatory to add anyone to the By-Name List. Ideally, all information is completed at intake to better understand the client's needs. If clients are missing information at time of intake, this may impact a person's prioritization for certain supports. Access Points should use assertive engagement to ensure any missing information is updated in HIFIS as quickly as possible.**

**\*\* If the family member(s) are not already in HIFIS, a new client profile will need to be created for each member.**

## HOUSING HISTORY- HOUSING HISTORY MODULE

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Housing Type

Country

Start Date

Address (if known)

## VI-SPDAT (SPDAT MODULE)

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VI-SPDAT Completed and Uploaded to HIFIS (Version 2 for Adults and Families, Version 1 for Youth)

*The BNL Report also pulls information from the **Case Management Module** and the **Housing Placement Module**. However, these modules are typically updated over time as staff members work with clients towards specific goals (e.g. Housing). Therefore, this information is not required to be entered upon intake.*