

By-name list referrals for shelter agencies

Peel Region has incorporated their By-Name List (BNL) into its existing Housing Transformation Initiative (HTI) technology.

A By-Name List (BNL) is a real-time list of people experiencing homelessness in Peel that can connect people to housing services and supports they need and can create a foundation for better service coordination.

The BNL provides a more standardized approach for assessment and referral protocols to support people experiencing homelessness by matching them to the services and supports they need.

The BNL helps organizations to understand homelessness, track changes in service needs, and coordinate and prioritize service delivery in Peel.

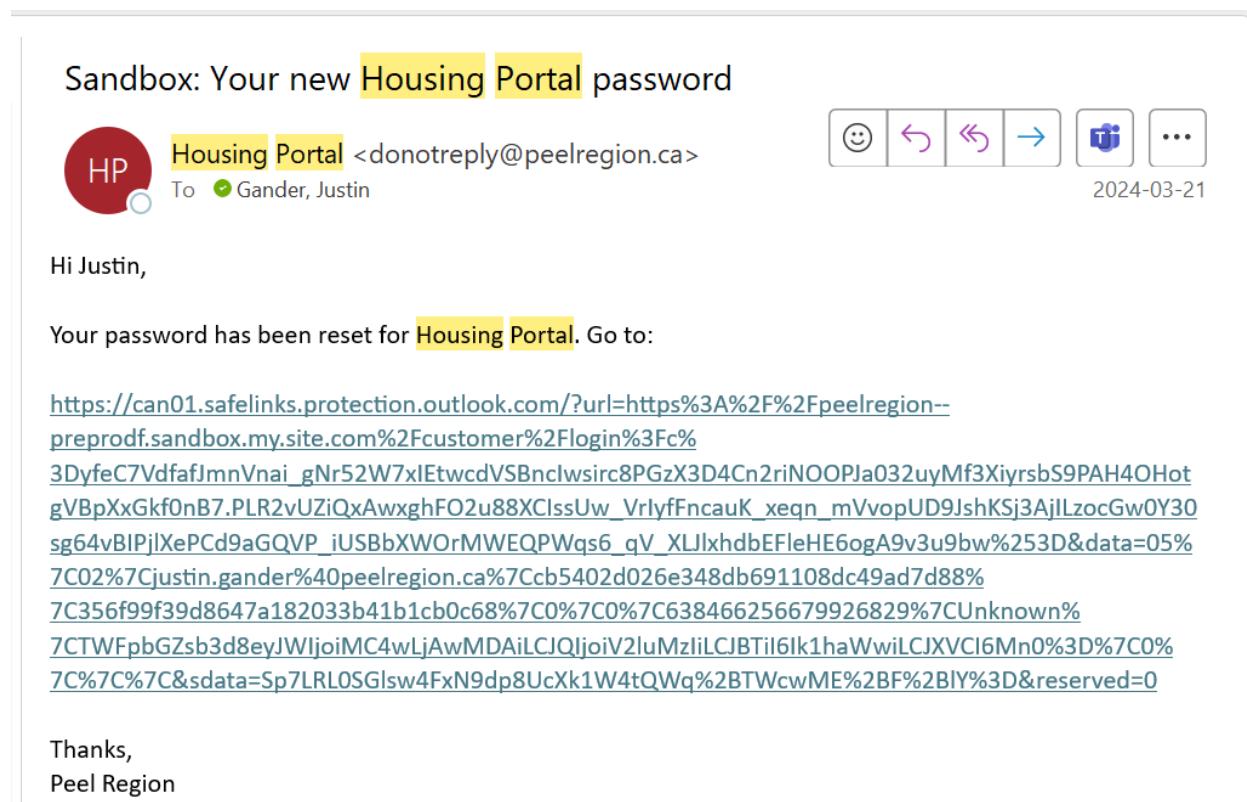
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For more information visit peelregion.ca

Logging in to the HTI Portal: creating a password

You will have received an e-mail that looks like the screenshot below. The purpose of this e-mail is to create your password. Click on the link in the e-mail to be directed to the screen to set your password.



Sandbox: Your new Housing Portal password

HP Housing Portal <donotreply@peelregion.ca> To Gander, Justin

Hi Justin,

Your password has been reset for Housing Portal. Go to:

https://can01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fpeelregion--preprod.sandbox.my.site.com%2Fcustomer%2Flogin%3Fc%3DyfeC7VdfafJmnVnai_gNr52W7xIEtwdVSBnclwsirc8PGzX3D4Cn2riNOOPJa032uyMf3XiyrsbS9PAH4OHogVBpXxGkf0nB7.PLR2vUZiQxAwxghFO2u88XClssUw_VrlfFncauK_xeqn_mVvopUD9JshKSj3AjlLzocGw0Y30sg64vBIPjlXePCd9aGQVP_iUSBbXWOrMWEQPWqs6_qV_XLJlxhdbEFleHE6ogA9v3u9bw%253D&data=05%7C02%7Cjustin.gander%40peelregion.ca%7Ccb5402d026e348db691108dc49ad7d88%7C356f99f39d8647a182033b41b1cb0c68%7C0%7C0%7C638466256679926829%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzliLCJBTiI6Ik1haWwiLCJXVCi6Mn0%3D%7C0%7C%7C&sdata=Sp7LRL0SGIsw4FxN9dp8UcXk1W4tQWq%2BTWcwME%2BF%2BIY%3D&reserved=0

Thanks,
Peel Region

Once you've set your password, you will be immediately directed to the home page.



For more information visit peelregion.ca

Logging in to the HTI Portal

If you already have a password, click on the following URL:
<https://web.apps.peelregion.ca/customer>

You will be directed to the login page. Enter your e-mail and password.



Username

Password

Remember me

[Forgot Your Password?](#)

[Sign Up](#)

Log In

For more information visit peelregion.ca

How to reset a password

If you're having difficulty logging in or you have forgotten your password, at the login page you can click **Forgot Your Password?**

You will receive an e-mail from Housing Portal prompting you to reset your password. Please follow the directions in the e-mail.



Region of Peel
Working for you

Username

Password

Remember me

[Forgot Your Password?](#)

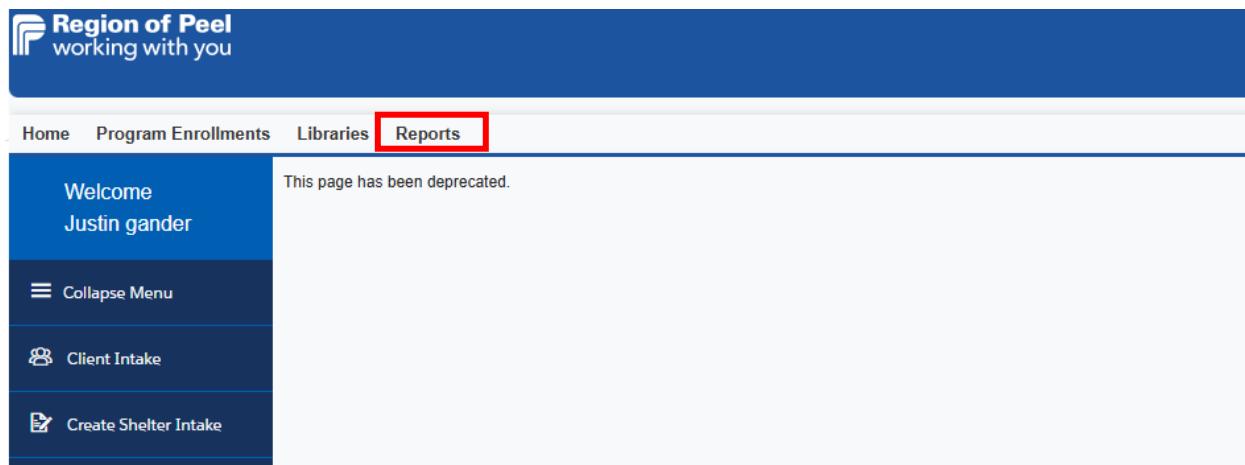
[Sign Up](#)

For more information visit peelregion.ca

Searching a client: using the Coordinated Access report

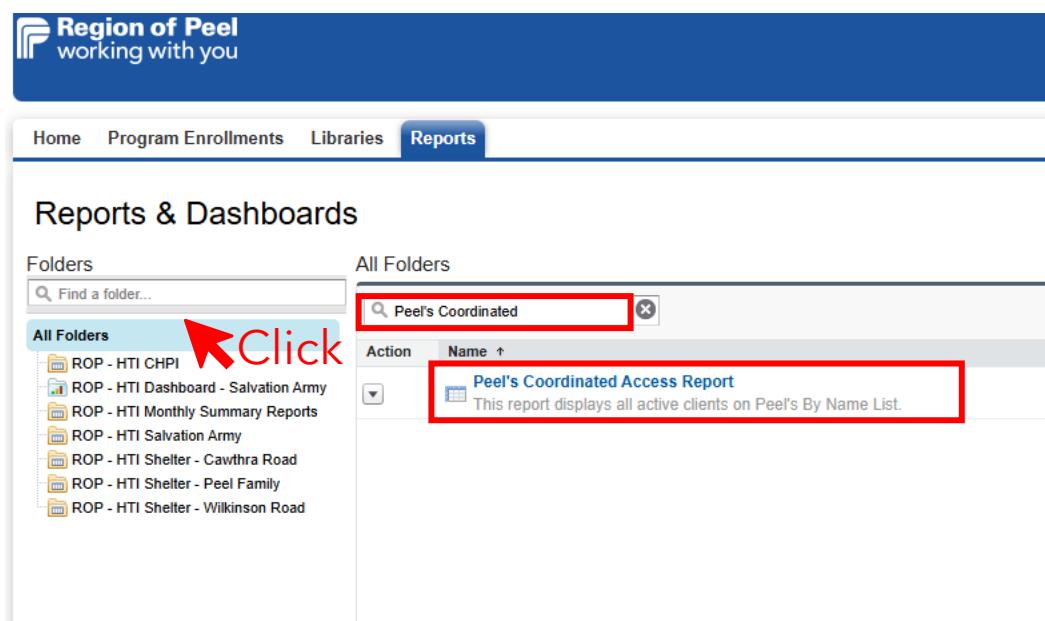
Before creating a new *Referral*, always check to see if the client is already active on Peel's Coordinated Access Report.

From the home page click on the *Reports* tab near the top.



The screenshot shows the Region of Peel website homepage. The top navigation bar includes links for Home, Program Enrollments, Libraries, and Reports. The Reports link is highlighted with a red box. The main content area on the left is a sidebar with a user profile (Welcome, Justin gander) and links for Client Intake and Create Shelter Intake. The main content area on the right displays a message: "This page has been deprecated." A red box highlights the "Reports" tab in the top navigation bar.

Make sure "All Folders" is selected and in the middle search bar type in "Peel's Coordinated Access Report". Click on the report.



The screenshot shows the "Reports & Dashboards" page. The top navigation bar includes links for Home, Program Enrollments, Libraries, and Reports. The Reports link is highlighted with a red box. The main content area shows a search interface. On the left, a sidebar titled "Folders" shows a list of report categories, with "All Folders" selected. A red arrow points to the "All Folders" link. On the right, a search results table is displayed under the heading "All Folders". The search bar contains the text "Peel's Coordinated". A red box highlights the search bar. The results table shows a single item: "Peel's Coordinated Access Report" with a description: "This report displays all active clients on Peel's By Name List." A red box highlights this item.

For more information visit peelregion.ca

You will be directed to the report page. From here you can view all active clients on the By Name List across all service providers in Peel.

Home Program Enrollments Libraries Reports

Peel's Coordinated Access Report

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Date Field: Baby Due Date Range: Custom From: To:

Filtered By:

Program Enrollment: Record Type equals HET : Housing Coordinated Access
AND Service Start date greater or equal 01/03/2025
AND Inactive equals False

Program Enrollment: Enrollment Name	Service Start date	Status	Owner
Gordon Greyson - Coordinated Housing Access	03/03/2025	Open	Justin gander([Change])
Ryan Reynolds - Coordinated Housing Access	03/03/2025	Open	Justin gander([Change])
Boris Todbringer - Coordinated Housing Access	04/03/2025	Open	Justin gander([Change])
adfafda adfaf - Coordinated Housing Access	13/03/2025	Open	Allison Walther([Change])
Joe Schmo - Coordinated Housing Access	20/03/2025	Open	Justin gander([Change])
Felicia Starlight - Coordinated Housing Access	24/03/2025	Open	Justin gander([Change])
Coby Cancun - Coordinated Housing Access	25/03/2025	Open	Justin gander([Change])

Grand Totals (7 records)

Confidential Information - Do Not Distribute

On your keyboard, press CTFL + F to bring up the search window on your browser. Type in the name of the client you want to search in the search window. The client's name will be highlighted if it is on the report. If you can find the client's name on the report, this means that the client is active on the BNL.

If you cannot locate the client on this list, then please proceed to [Creating a new referral](#).

← → ⌂ peelregion--preprod.sandbox.my.site.com/customer/000Au0000004frt3

Region of Peel working with you

Home Program Enrollments Libraries Reports

Peel's Coordinated Access Report

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Date Field: Baby Due Date Range: Custom From: To:

Filtered By:

Program Enrollment: Record Type equals HET : Housing Coordinated Access
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Program Enrollment: Enrollment Name	Service Start date	Status	Owner
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Boris Todbringer - Coordinated Housing Access	04/03/2025	Open	Justin gander([Change])
adfafda adfaf - Coordinated Housing Access	13/03/2025	Open	Allison Walther([Change])
Joe Schmo - Coordinated Housing Access	20/03/2025	Open	Justin gander([Change])
Felicia Starlight - Coordinated Housing Access	24/03/2025	Open	Justin gander([Change])
Coby Cancun - Coordinated Housing Access	25/03/2025	Open	Justin gander([Change])

Grand Totals (7 records)

Confidential Information - Do Not Distribute

For more information visit peelregion.ca

Creating a new By-Name list referral

To create a new By-Name List Referral, from the Client's *Program Enrollment Page* click on **Create Benefit Case**.

There are no updates.

[« Back to List: Program Enrollments](#)

[Benefit Cases \(1\)](#) | [Case Notes \(0\)](#) | [Notes & Attachments \(0\)](#) | [Program Enrollment Members \(1\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Applications \(1\)](#) | [Consents \(2\)](#) | [Disbursements \(0\)](#)

Program Enrollment Detail [Edit](#)

[ASSESSMENT](#) [ASSIGN A BED](#) **[CREATE BENEFIT CASE](#)** [DISCHARGE](#) [BED TRANSFER](#) [CLIENT REAPPLICATION](#) [UPDATE CLIENT INFORMATION](#) [...](#)

Shelter/Stay-the-Night Intake Stay-the-Night

Enrollment Name	Powers - Emergency Services	Owner	Justin_gander (Change)
Primary Applicant	Austin Powers	OW Assigned to	
Program	Emergency Services	Primary assigned to	
Days Since Application Filed	6	Assigned to	
Referral Source		Stage	Shelter Intake
Type	Emergency Services	Status	
Sub Type	Single Shelter	PE Close Reason	
Household Composition		Close Date	
Provincial Other - please specify		Program Type	
		Referred Shelter	Salvation Army of Peel

[Health](#)

Click on **Create** to proceed.

Benefit Case

You are about to create Benefit Case for [Powers - Emergency Services](#)
Click 'Create' to proceed further

[Cancel](#) [Save For Later](#) **[Create](#)**

You will be directed to the *Benefit Case Detail* page. Click on **Create Service Plan**.

For more information visit peelregion.ca

**Benefit Case Detail**[Edit](#)**Actions**[CREATE SERVICE PLAN](#)

Case Number: C-00045237
Name: BC-Maple Leafs - Emergency Services
Primary Contact: Toronto Maple Leafs
Program Enrollment: [Maple Leafs - Emergency Services](#)
By Name List:

Dates

Date Closed
Date Opened: 23/10/2025

People / Accounts / Households[Edit](#)**Open Activities**[New Task](#)

No records to display

You will be directed to the "Create Service Plan" page.

- 1. Select Family Member:** ensure to select the family head from the drop down.
- 2. Service Plan Type:** Select "Assistance with housing" from the drop down.

Click on **Create** to proceed.

For more information visit peelregion.ca

Create Service Plan

You are about to create Service Plan for BC-Maple Leafs - Emergency Services

Fill all required details and Click "Create" to proceed further

Outreach/Community Referrals Illustrative Examples:

Referral to Community Services, Income Assistance, Extreme Weather Shelters.

Assistance with Housing Illustrative Examples:

Housing Search Assistance, Utility Assistance / Deposit, Rent Assistance / Deposit, Landlord Mediation.

Education Illustrative Examples:

Budgeting Skills, Support with Tenant Rights, Support with Life Skills.

Practical Assistance Illustrative Examples:

Support with Obtaining I.D., Provision of Clothing, Food, Household Supplies, Issuance of Emergency Funds for Moving, Issuance of Transportation.

SELECT FAMILY MEMBER *

Toronto Maple Leafs

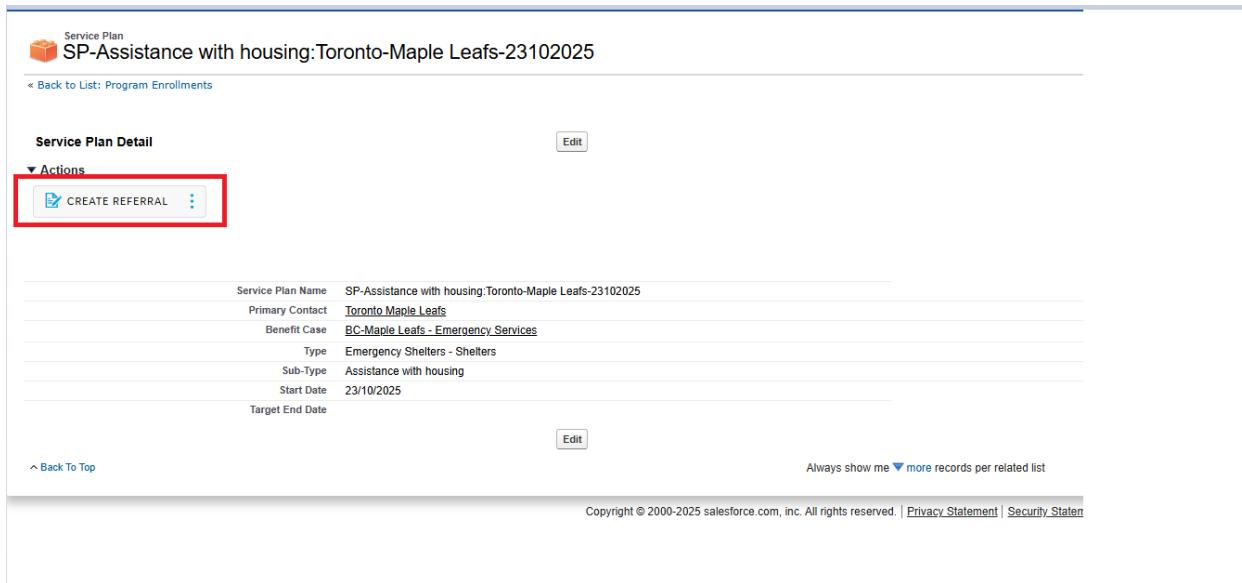
SERVICE PLAN TYPE *

Assistance with housing

Cancel | Save For Later

Create

You will be directed to the Service Plan details page. Click on **Create Referral**.



Service Plan
SP-Assistance with housing:Toronto-Maple Leafs-23102025
« Back to List: Program Enrollments

Service Plan Detail

Actions

CREATE REFERRAL

Service Plan Name	SP-Assistance with housing:Toronto-Maple Leafs-23102025
Primary Contact	Toronto Maple Leafs
Benefit Case	BC-Maple Leafs - Emergency Services
Type	Emergency Shelters - Shelters
Sub-Type	Assistance with housing
Start Date	23/10/2025
Target End Date	

[Edit](#)

[Edit](#)

Always show me [more](#) records per related list

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You will be directed to the *Referral Details* page. Please fill in the following fields:

- 1. Reason for Referral:** type in "Refer to BNL" or a similar statement.
- 2. Referral Type:** Select 'Housing Services' from the list.
- 3. Service Offering:** Select 'By-Name List' from the list.

Once the above is completed, please click on **Submit**.

For more information visit peelregion.ca

You are about to create Referral for SP-Assistance with housing:Austin-Powers-1032025

Fill all required details and Click "Create" to proceed further

REASON FOR REFERRAL *

Refer to BNL

STATUS
Open

REFERRAL DATE
03-10-2025

TARGET COMPLETION DATE



FOLLOW-UP NEEDED?

REFERRAL TYPE *

Housing Services

Click here to view all available products

SERVICE OFFERING (EX. CREDIT COUNSELLING)

By-Name List



Cancel

Submit

You will see the new Referral appear in the *Referrals* section. Please click on the link to the new Referral to be directed to the Referral page.

Home Program Enrollments Libraries Reports



Service Plan
SP-Assistance with housing:Austin-Powers-1032025

Service Plan Detail

Edit

▼ Actions

CREATE REFERRAL



Service Plan Name SP-Assistance with housing:Austin-Powers-1032025

Primary Contact Austin Powers

Benefit Case BC-Powers - Emergency Services

Type Emergency Shelters - Shelters

Sub-Type Assistance with housing

Start Date 10/03/2025

Target End Date

Edit



Referrals

Action Referral Name

Edit Austin Powers-Housing Services - Referral

Type

Outcom

Housing Services

Edit Austin Powers-Housing Services - Referral

Housing Services

^ Back To Top

For more information visit peelregion.ca

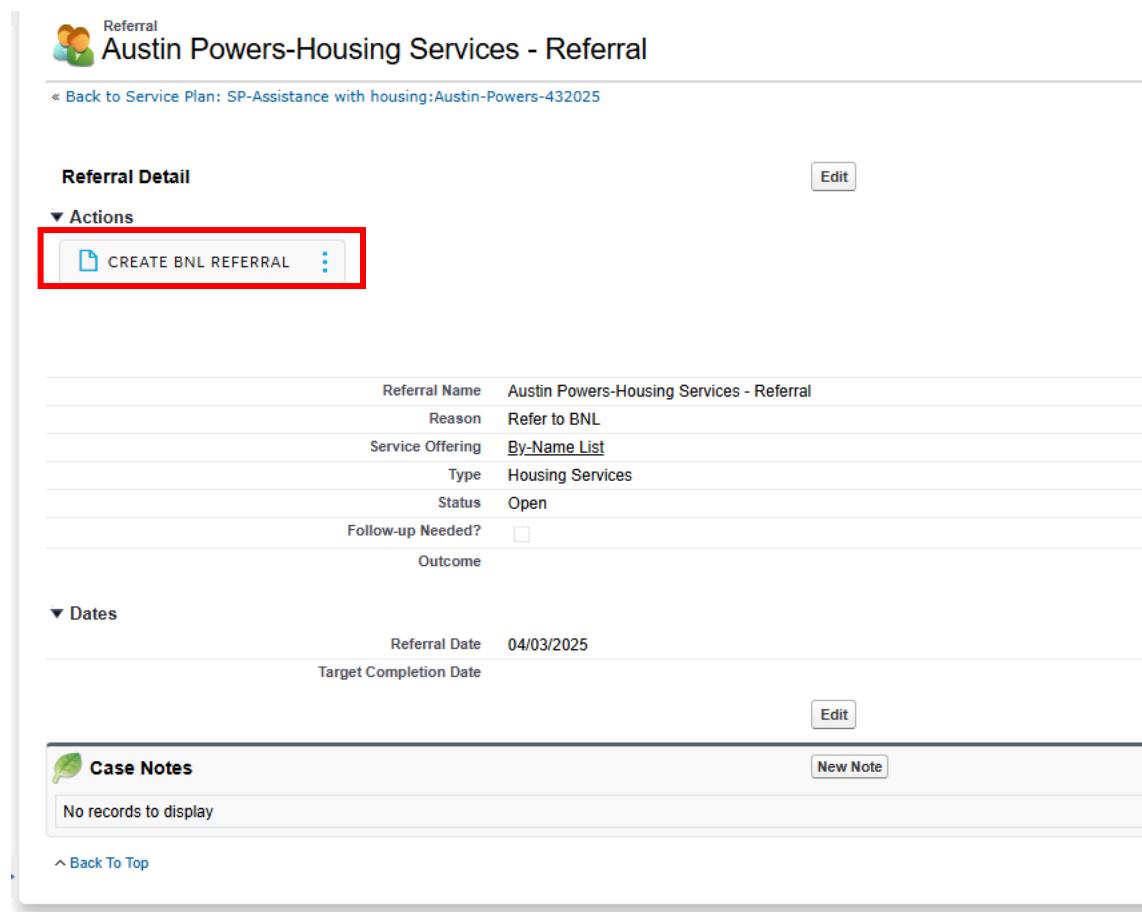
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@peelregion.ca

@regionofpeel

Peel Region

Once you are in the Referral page, please click on the **Create BNL Referral** action button near the top of the page.



The screenshot shows a web-based application for managing referrals. At the top, there is a header with a user icon and the text "Austin Powers-Housing Services - Referral". Below the header, a link "« Back to Service Plan: SP-Assistance with housing:Austin-Powers-432025" is visible. The main content area is titled "Referral Detail" and includes an "Edit" button. A section titled "Actions" contains a button labeled "CREATE BNL REFERRAL" with a red box drawn around it. Below this, there is a table with the following data:

Referral Name	Austin Powers-Housing Services - Referral
Reason	Refer to BNL
Service Offering	By-Name List
Type	Housing Services
Status	Open
Follow-up Needed?	<input type="checkbox"/>

Below the table, there is a section titled "Outcome". Under "Outcome", there is a "Referral Date" set to "04/03/2025" and a "Target Completion Date". An "Edit" button is located next to the target completion date. A "Case Notes" section follows, containing a "New Note" button and the message "No records to display". At the bottom of the page, there is a link "Back To Top".

Next you will be directed to the *By Name List Consents* page. When working with a client it is imperative that they read through and understand this page. Proceed through all of the questions with the client and appropriately indicate their responses.

Click **Next** to proceed.

For more information visit peelregion.ca

By Name List Consent

Notice of Collection of Personal and/or Personal Health Information Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) Personal Health Information Protection Act (PHIPA)

Your information is being collected in pursuant to the *Municipal Act*, 2001, S.O. 2001, c.25, s.11(1) and the *Housing Services Act*, 2011, S.O. 2011, c.6, Schedule 1, ss. 13, 44 and 60 and will be retained, used, disclosed and disposed of in accordance with all applicable municipal, federal and provincial laws and regulations governing the collection, use, disclosure, retention and disposal of your information, including the *Municipal Freedom of Information and Protection of Privacy Act*, R.S.O. 1990. C.M.56, and the *Personal Health Information and Protection Act*, 2004, S.O. 2004. C.3.

This information will be used by Region of Peel Housing Services and associated Shelters for the purposes of providing shelter and housing services, administration, establishing interventions, service coordination, planning and improving services and housing system reporting. Any questions regarding this collection may be directed to Housing Services, 10 Peel Centre Drive, Suite 8, 5th Floor, Brampton, ON, L6T 0E7, 905-791-7800 or email zg-housingbusinessoperations@peelregion.ca.

BNL Primary Consent to Collection & Use

What is the By-Name List?

The By-Name List is a real-time list of all known people experiencing homelessness in the community. It provides data that supports:

- Coordinated access to services and housing resources
- System performance assessment; and
- Policy and resource advocacy.

Being added to the By-Name List does not guarantee an offer of housing. Housing and supports are distributed based on best fit and greatest need, according to the information on the By-Name List. Partners in Peel's housing and homelessness system will provide ongoing assistance to household on the By-Name List to help access service and connect to housing and support.

Collection & Use of Personal and/or Personal Health Information

Before we begin, I need to tell you that I will be asking you some personal and/or personal health information and will be recording your responses in a secure Salesforce System managed by the Region of Peel Housing Services. I need to do this so that all your personal and/or personal health information can be safely stored and used for service delivery. Your name and contact information is required, but you may decline to provide anything else you would prefer not to share. Having quick access to complete, up-to-date and accurate information puts your housing providers in the best position to help you. This information will include (but not limited to):

Basic Information:

- personal identifiable information about you and your dependents including:
- name
- date of birth
- gender
- phone number
- email address
- mailing address

Coordination of Care & Housing Information:

- referral information
- needs and prioritization assessment details
- assessment notes and case plans
- household income and source
- length of homelessness & current housing status
- services you are receiving such as housing, employment and health services

Basic Information:

- personal identifiable information about you and your dependents including:
- name
- date of birth
- gender
- phone number
- email address
- mailing address

Coordination of Care & Housing Information:

- referral information
- needs and prioritization assessment details
- assessment notes and case plans
- household income and source
- length of homelessness & current housing status
- services you are receiving such as housing, employment and health services

The information collected is only visible to authorized Housing Services employees and authorized service partners.

Your information may also be used for housing system reporting and evaluating the quality of services delivered by Peel Region and its partners, so that the Region can improve services to its clients. Your name will not be shared in any report coming from the housing system reporting or evaluations and will only contain non-identifying information.

You have the right to withhold or withdraw your consent at any time.

Do you consent to the collection and use of your personal and/or personal health information for the purposes listed above, including being placed on the By-Name List and receiving services?

Salesforce Tier One Consent to Disclosure

The Region of Peel uses a cloud-based Customer Relationship Management and booking systems which is used by authorized employees of the Region, and by authorized employees of some Service Providers who are contracted by the Region to provide programs and services, for purposes including booking appointments, registering clients for programs and services, reporting and planning. Do you consent to your name as well as your email and/or telephone number being entered into these booking systems and being accessible to all users?

Next

You will be directed to more consent related questions. Please read through each question carefully with the client.

For more information visit peelregion.ca

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 @regionofpeel

 **Peel Region**

By Name List Consent

Email and/or Text Consent

Do you give consent to the Region of Peel contacting you at the email and/or text number provided? Email and text messages are not encrypted, so we cannot guarantee the security of messages. For that reason, we will minimize any personal information over email and/or text.

Yes, I consent to email communication Yes, I consent to text communication Both No, I do not consent

BNL Coordinated Access Consent for Referrals

Do you consent to the use of your personal and/or personal health information to prioritize you for housing assistance and supports and also being shared for purposes of making referrals to service providers?

Yes, I consent No, I do not consent

Coordinated Access Case Conferencing Consent to Disclosure

You also have the option to consent to sharing your personal and/or personal health information with coordinated access system partners for the purposes of Case Conferencing to optimize the delivery of housing services and supports. It is important to know that case presentations are free of personal identifiers. A current list of coordinated access system partners is available at peelregion.ca/coordinatedaccess.

We are asking for your consent to discuss the following at Case Conferences:

- ? Your experience with homelessness (length of homelessness, current housing status)
- ? Services you are receiving (housing, employment)
- ? Barriers to obtaining housing
- ? Action Plan to help you achieve suitable housing based on your identified needs

All information discussed at the case conferencing table will remain confidential within the ROPs coordinated access system partners and will not be shared with any other person or agency. All agencies taking part in the case conferencing must follow all applicable Ontario privacy laws, such as, the Municipal Freedom of Information and Protection of Privacy Act and the Personal Health Information Protection Act.

Note: This consent does not apply to the copies of your assessments that other service providers may have already conducted.

4.a. Do you consent to the sharing of your personal and/or personal health information with coordinated access system partners for the purposes of Case Conferencing, in order to provide you with further housing assistance and support services? Your identity will be protected.

Yes, I consent No, I do not consent

[Previous](#)

[Next](#)

You will be directed to the *Referral Details* page. Enter your details and contact information here. Click **Next** to proceed.

Note: the fields with the (*) next to them are **mandatory** and must be filled in before proceeding.

Referrer Details

Referrer Details

How did you hear about Housing Services?

Community Service Provider

* Name of Referring Agency/Organization

Salvation Army of Peel

* Full name of referrer

* Telephone number of organization/agency or referrer

Error: Full name of referrer is required.

Phone Extension

* Email address of referrer

[Previous](#)

[Next](#)

The following pages will require you to record personal and demographic information about the client. Once you are finished with this page, click on **Next** to proceed.

Note: the fields with the (*) next to them are mandatory and must be filled in before proceeding. The questions that have the checkboxes (□) are multi-select which allows you to select multiple responses for one question.

For more information visit peelregion.ca

Member & Income Details

* How many individuals are there in your household?

Error: How many individuals are there in your household? is required.

Please navigate to next page after completing adding all members.

You must enter either a phone number or an email address in order to proceed.

Member Information

Add

* Applicant First Name

Applicant Middle Name

* Applicant Last Name

Preferred Name

* Date of Birth

Phone No

Alternative Phone No

Email

* Gender

- Agender
- Bigender
- Gender fluid
- Genderqueer
- Man
- Questioning
- Transgender man
- Transgender woman
- Two Spirit
- Woman
- Additional gender category/identity, specify:
- Prefer not to answer

Error: Gender is required.

* Marital Status

You must be over 16 years old.

Employment Status

* Do you have a current address?

Emergency Contact Name

Emergency Contact Phone

Emergency Contact Email

Emergency Contact relationship

Is there someone we can contact to get in touch with you to notify you of a housing or service availability, or to update your file if you are approaching inactivity (...)

Same as emergency contact?

Individual or Organization Name

Phone number

Income Info

Add

Income Source

Frequency of Income

Income (Gross)

Net Income (After Tax)

Asset Info

Add

Asset Source

Asset Value

* Do you have any additional household members?

Previous

Next

If you want to add an additional member, click on the **Add** button on the top right of the form.

For more information visit peelregion.ca



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Member & Income Details

*How many individuals are there in your household?

Error: How many individuals are there in your household? is required.

Please navigate to next page after completing adding all members.

You must enter either a phone number or an email address in order to proceed.

Member Information

Add

* Applicant First Name	Applicant Middle Name	* Applicant Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Preferred Name	* Date of Birth	
<input type="text"/>	<input type="text"/>	
Phone No	Alternative Phone No	
<input type="text"/>	<input type="text"/>	
Email	<input type="text"/>	
<input type="text"/>		

Next you will be asked to record the client's **Accommodation Expenses**. This refers to their costs to maintain their housing. **This information is not mandatory.**

Current Accommodation Expenses

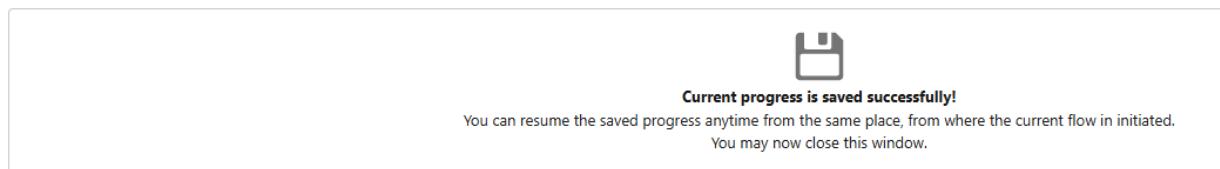
Type of Accommodation	* Type of dwelling
<input type="text"/> Rent	<input type="text"/> Apartment
* Accommodation Expense Amount	
<input type="text"/> \$1,600.00	

Previous

Next

Next you will be directed to the *Confirmation* page.

IMPORTANT! You must click on the **Save** button to successfully save changes otherwise your progress will be lost.



 Save

Please click on Save button to save all the details . Co ordinator will review the details and complete the Intake.

Needs Assessment

For more information visit peelregion.ca

On the same page, click on **Needs Assessment** to proceed to the Needs Assessment portion of the process.



Current progress is saved successfully!
You can resume the saved progress anytime from the same place, from where the current flow in initiated.
You may now close this window.

Please click on Save button to save all the details . Co ordinator will review the details and complete the Intake.

Needs Assessment

Proceed through all of the questions with the client. All of the question are **mandatory** and must be answered.

Note: The questions that have the checkboxes () are multi-select which allows you to select multiple responses for one question. The questions with the round checkboxes () are single-select.

Factors that contribute to or complicate household circumstances

* What factors contributed to or complicated your household's circumstances? (Select all that apply)

Criminal justice issues
 Discharge from institution or care
 Discrimination
 Financial circumstances
 Health, safety or well-being
 Hoarding/Collecting or Housekeeping
 Household member changes
 Recent immigration
 Poor credit history
 Language barriers or literacy challenges
 History of homelessness
 Moving
 Others, Specify
 None
 Prefer not to answer

Error: What factors contributed to or complicated your household's circumstances? (Select all that apply) is required.

* Are the criminal justice issues:

Resolved
 Ongoing
 Prefer not to answer
 Not applicable

* Are there current legal restrictions on where you can reside? (BNL)

Yes
 No
 Do not know
 Prefer not to answer

Steps

- Factors that contribute to or complicate household circumstances
- Urgent Risks And Vulnerabilities
- Goals and Activities
- Comments/Additional Information
- Confirmation

Once you finished going through all of the questions, you will reach the **Save Needs Assessment** page.

For more information visit peelregion.ca

IMPORTANT! To ensure your progress is saved, click on the **Save and Complete** button.

Once that is done, you will receive a message saying that it has been saved, and you can close the window.

Save Needs Assessment

Thank you for completing the assessment. Please make sure to click Save and Complete. Your request to onboard the client to Bbyname list will be processed by the Bbyname list co ordinator.

 Save and Complete

 Previous

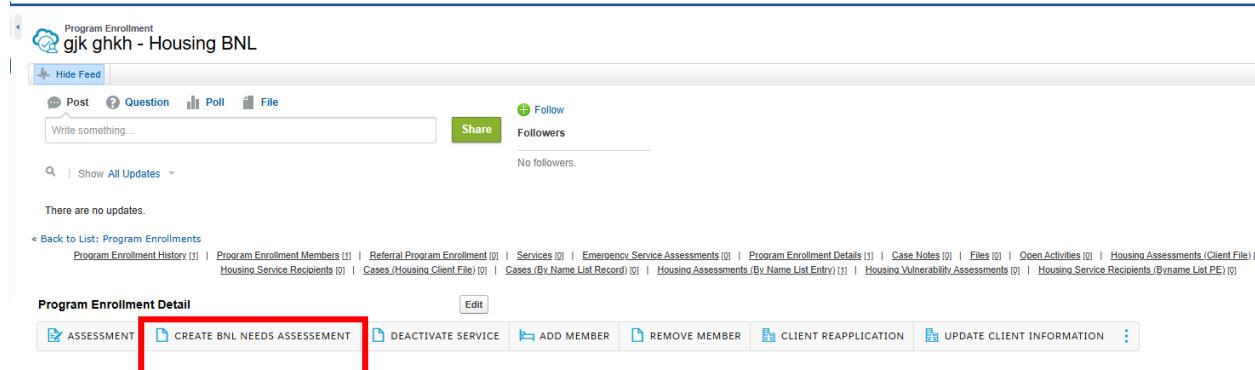
Both the Referral and Needs Assessment will be processed by the By-Name List Coordinator. Once the By-Name List Coordinator has reviewed and processed them, the client's By-Name List record will show up on your service provider's By-Name List Report.

For more information visit peelregion.ca



Creating a Needs Assessment

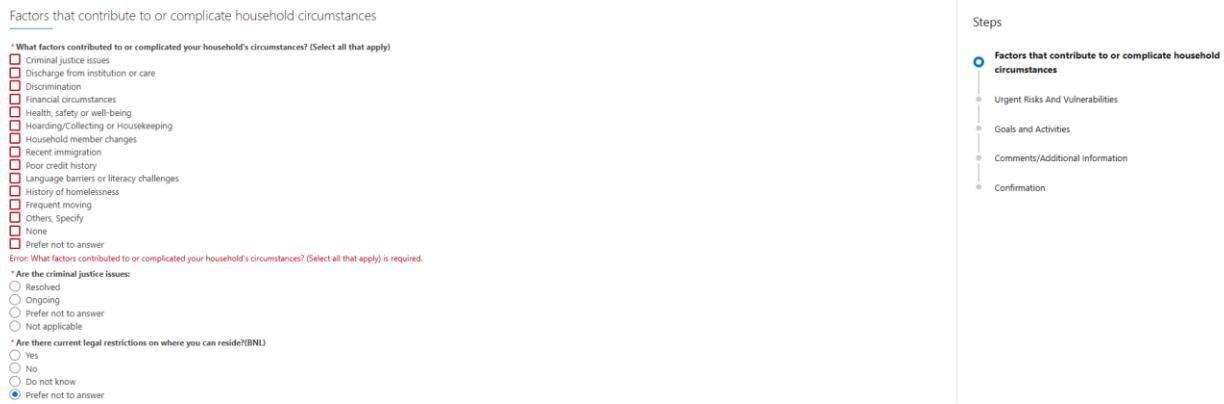
From the client's BNL program enrollment, click on **Create BNL Needs Assessment** towards the top of the page.



The screenshot shows a software interface for 'Program Enrollment' under 'gjk ghkh - Housing BNL'. At the top, there's a feed with options to 'Post', 'Question', 'Poll', and 'File'. Below the feed is a text input field with placeholder 'Write something...' and a 'Share' button. To the right, there's a 'Followers' section showing 'No followers.' and a search bar with 'Show All Updates'. Below the feed, a navigation bar includes links like 'Back to List: Program Enrollments', 'Program Enrollment History', 'Program Enrollment Members', 'Referral Program Enrollment', 'Services', 'Emergency Service Assessments', 'Program Enrollment Details', 'Case Notes', 'Files', 'Open Activities', 'Housing Assessments (Client File)', 'Housing Service Recipients', 'Cases (Housing Client File)', 'Cases (By Name List Record)', 'Housing Assessments (By Name List Entry)', 'Housing Vulnerability Assessments', and 'Housing Service Recipients (By Name List PE)'. A 'Program Enrollment Detail' section follows, with a toolbar containing buttons for 'ASSESSMENT' (highlighted with a red box), 'CREATE BNL NEEDS ASSESSMENT' (also highlighted with a red box), 'DEACTIVATE SERVICE', 'ADD MEMBER', 'REMOVE MEMBER', 'CLIENT REAPPLICATION', and 'UPDATE CLIENT INFORMATION'.

Proceed through all of the questions with the client. All of the question are **mandatory** and must be answered.

Note: The questions that have the checkboxes (□) are multi-select which allows you to select multiple responses for one question. The questions with the round checkboxes (○) are single-select.



Factors that contribute to or complicate household circumstances

* What factors contributed to or complicated your household's circumstances? (Select all that apply)

- Criminal justice issues
- Discharge from institution or care
- Discrimination
- Financial circumstances
- Health, safety or well-being
- Hoarding/Collecting or Housekeeping
- Household member changes
- Recent immigration
- Poor credit history
- Language barriers or literacy challenges
- History of homelessness
- Frequent moving
- Others, Specify
- None
- Prefer not to answer

From: What factors contributed to or complicated your household's circumstances? (Select all that apply) is required.

* Are there criminal justice issues:

- Resolved
- Ongoing
- Prefer not to answer
- Not applicable

* Are there current legal restrictions on where you can reside (BNL):

- Yes
- No
- Do not know
- Prefer not to answer

Steps

- Factors that contribute to or complicate household circumstances
- Urgent Risks And Vulnerabilities
- Goals and Activities
- Comments/Additional Information
- Confirmation

Once you are finished going through all of the questions, you will reach a confirmation page. From here you can close the window.

For more information visit peelregion.ca

Confirmation

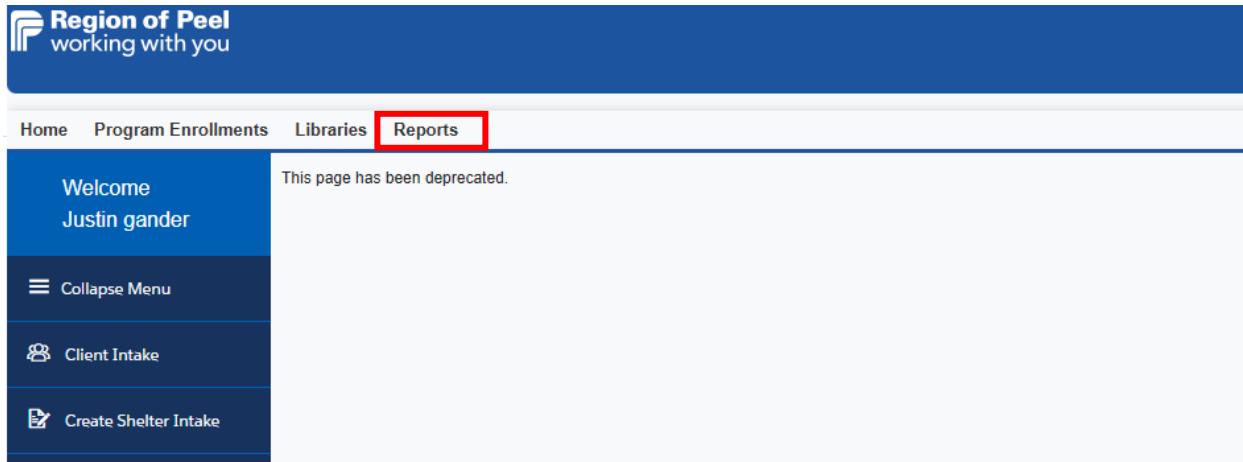
Thank you for completing the Client Assessment.

For more information visit peelregion.ca



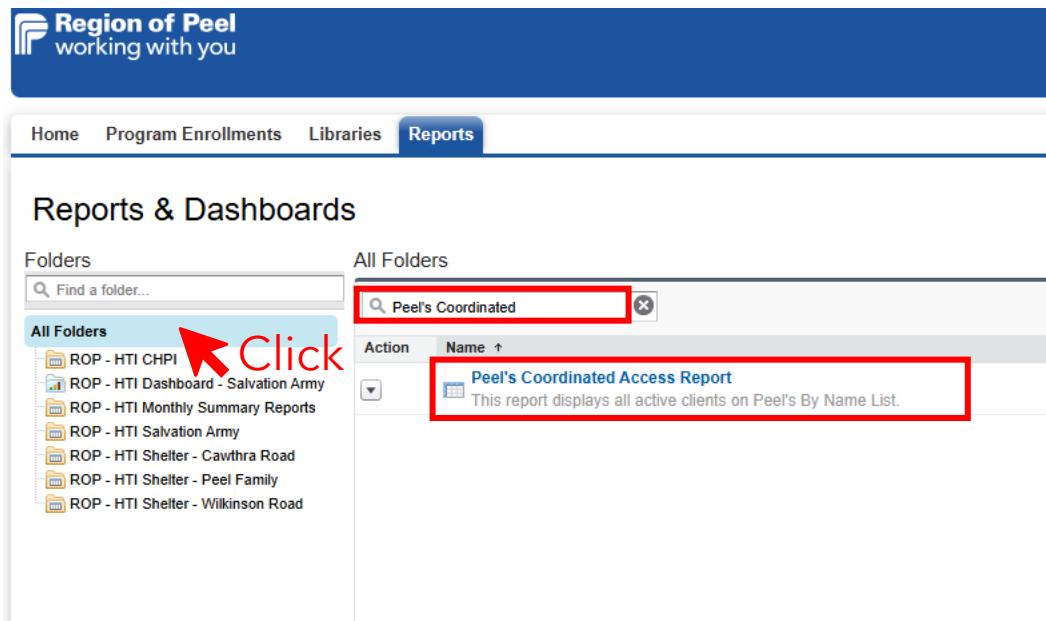
Accessing Peel's Coordinated Access report

From the home page click on the *Reports* tab near the top.



The screenshot shows the Region of Peel website interface. At the top, there is a blue header bar with the Region of Peel logo and the tagline "working with you". Below the header, there is a navigation bar with four tabs: "Home", "Program Enrollments", "Libraries", and "Reports". The "Reports" tab is highlighted with a red box. To the left of the main content area, there is a sidebar with a "Welcome" message for "Justin gander" and three buttons: "Collapse Menu", "Client Intake", and "Create Shelter Intake". The main content area displays a message: "This page has been deprecated.".

Make sure "All Folders" is selected and in the middle search bar type in "Peel's Coordinated Access Report". Click on the report.



The screenshot shows the Region of Peel website interface, similar to the previous one but with a different search result. The "Reports" tab is selected. The main content area is titled "Reports & Dashboards". On the left, there is a sidebar with a "Folders" section. A red arrow points to the "ROP - HTI CHP1" folder. To the right, there is a search results table with a header "All Folders". The search bar contains the text "Peel's Coordinated". The table has columns for "Action", "Name", and a description. A red box highlights the "Peel's Coordinated Access Report" entry, which is described as "This report displays all active clients on Peel's By Name List.".

You will be directed to the report page. From here you can view all active clients on the By Name List across all service providers in Peel.

For more information visit peelregion.ca

 **Peel's Coordinated Access Report**

Report Generation Status: Complete

Report Options:

Summarize information by:

Show

Time Frame

Date Field

Range

From

To

[Run Report](#) [Hide Details](#) [Printable View](#) [Export Details](#)

Filtered By:

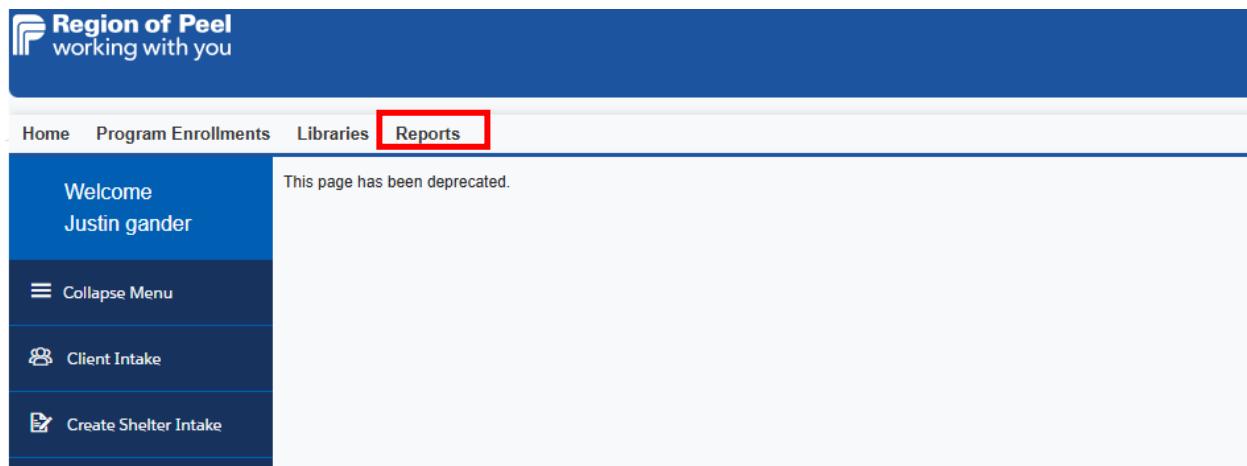
Program Enrollment: Record Type equals HET : Housing Coordinated Access
AND Service Start date greater or equal 01/03/2025

Program Enrollment: Enrollment Name	Service Start date	Status	Owner
Gordon Greysen - Coordinated Housing Access	03/03/2025	Open	Justin gander([Change])
Ryan Reynolds - Coordinated Housing Access	03/03/2025	Open	Justin gander([Change])
Austin Powers - Coordinated Housing Access	04/03/2025	Closed	Justin gander([Change])
Boris Todbringer - Coordinated Housing Access	04/03/2025	Open	Justin gander([Change])
adfadfa adfadf - Coordinated Housing Access	13/03/2025	Open	Allison Walther([Change])
Tabitha Newberry - Coordinated Housing Access	13/03/2025	Closed	Justin gander([Change])
Jamie Brightwater - Coordinated Housing Access	14/03/2025	Closed	Justin gander([Change])
Vic Hoss - Coordinated Housing Access	18/03/2025	Closed	Justin gander([Change])
Felicia Starlight - Coordinated Housing Access	19/03/2025	Open	Justin gander([Change])
Garth Brooks - Coordinated Housing Access	19/03/2025	Closed	Justin gander([Change])
Joe Schmo - Coordinated Housing Access	20/03/2025	Open	Justin gander([Change])
Liam O'Connor - Coordinated Housing Access	21/03/2025	Closed	Justin gander([Change])
Felicia Starlight - Coordinated Housing Access	24/03/2025	Open	Justin gander([Change])

Grand Totals (13 records)For more information visit peelregion.ca

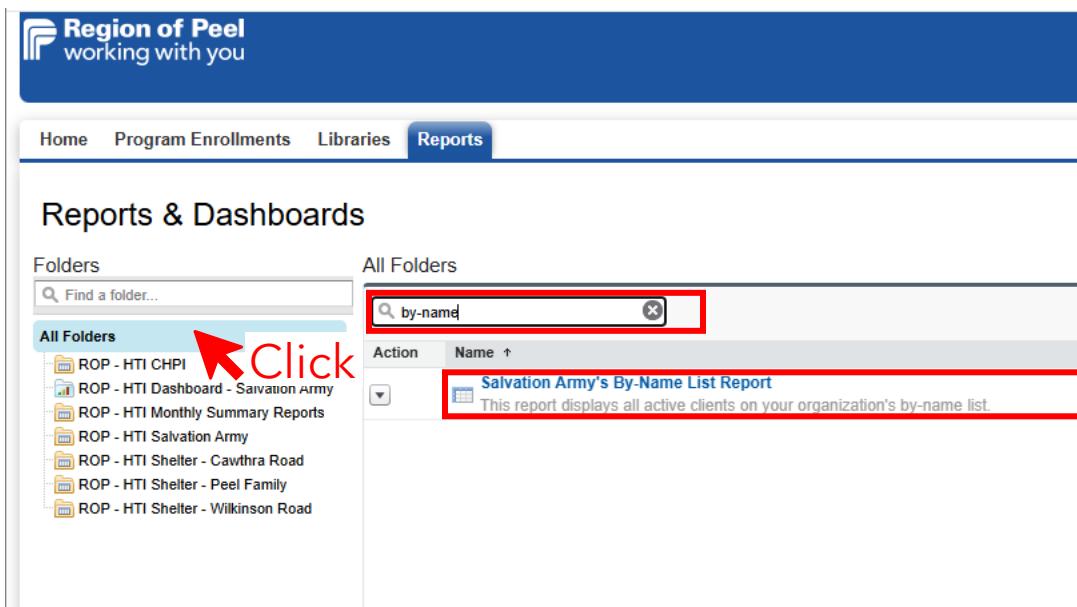
Accessing your organization's By-Name list

From the home page click on the *Reports* tab near the top.



The screenshot shows the Region of Peel website with a blue header. The 'Reports' tab is highlighted with a red box. The left sidebar shows 'Welcome' and 'Justin gander', and a 'Collapse Menu' button. The main content area says 'This page has been deprecated.'

Make sure "All Folders" is selected and in the middle search bar type in "By Name List". Click on the report.



The screenshot shows the 'Reports & Dashboards' page. The 'Folders' section on the left has a search bar with 'ROP - HTI CHPI' and a red arrow pointing to it with the text 'Click'. The 'All Folders' section in the center has a search bar with 'by-name' and a red box around it. A report titled 'Salvation Army's By-Name List Report' is listed, with a red box around it and the text 'This report displays all active clients on your organization's by-name list.'

You will be directed to the report page. From here you can view all of your active clients on the By Name List. From here you can access your client's BNL record directly to make any updates.

For more information visit peelregion.ca

Salvation Army's By-Name List Report

Report Generation Status: Complete

Report Options:

Summarize information by:

--None--

Show

All program enrollments

Time Frame

Date Field

Baby Due Date

Range

Custom

From

To

[Run Report](#)

[Hide Details](#)

[Printable View](#)

[Export Details](#)

Filtered By:

Program Enrollment: Record Type equals HET : Housing By Name List Entry
AND BNL Created Date greater or equal 01/03/2025

Program Enrollment Members: Program Enrollment Members Ref	Program Enrollment: Enrollment Name	By-Name List Creation	Last Contacted Date
PEM-500746	Gordon Greyson - Housing BNL	03/03/2025	-
PEM-500748	Ryan Reynolds - Housing BNL	03/03/2025	-
PEM-500762	Austin Powers - Housing BNL	04/03/2025	-
PEM-500763	Parbhi Wati - Housing BNL	07/04/2025	-
PEM-500766	Boris Todbringer - Housing BNL	-	-
PEM-500781	adfafda adfafd - Housing BNL	-	-
PEM-500784	Tabitha Newberry - Housing BNL	-	-
PEM-500787	Jamie Brightwater - Housing BNL	14/03/2025	-
PEM-500804	Vic Hoss - Housing BNL	18/03/2025	-
PEM-500805	Vic Hoss - Housing BNL	18/03/2025	-
PEM-500808	Felicia Starlight - Housing BNL	19/03/2025	-
PEM-500811	Garth Brooks - Housing BNL	19/03/2025	-
PEM-500817	Joe Schmo - Housing BNL	20/03/2025	-
PEM-500825	Liam O'Connor - Housing BNL	21/03/2025	-
PEM-500827	Liam o'Connor - Housing BNL	21/03/2025	-
PEM-500838	Felicia Starlight - Housing BNL	24/03/2025	-

Grand Totals (16 records)

 Click to access client record

For more information visit peelregion.ca

 @regionofpeel

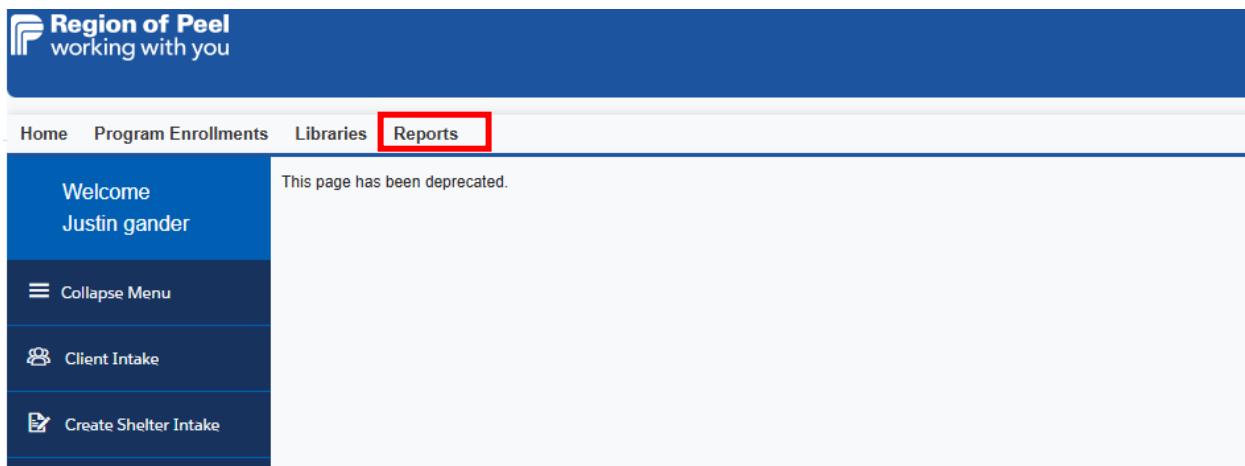
 @peelregion.ca

 @regionofpeel

 **Peel Region**

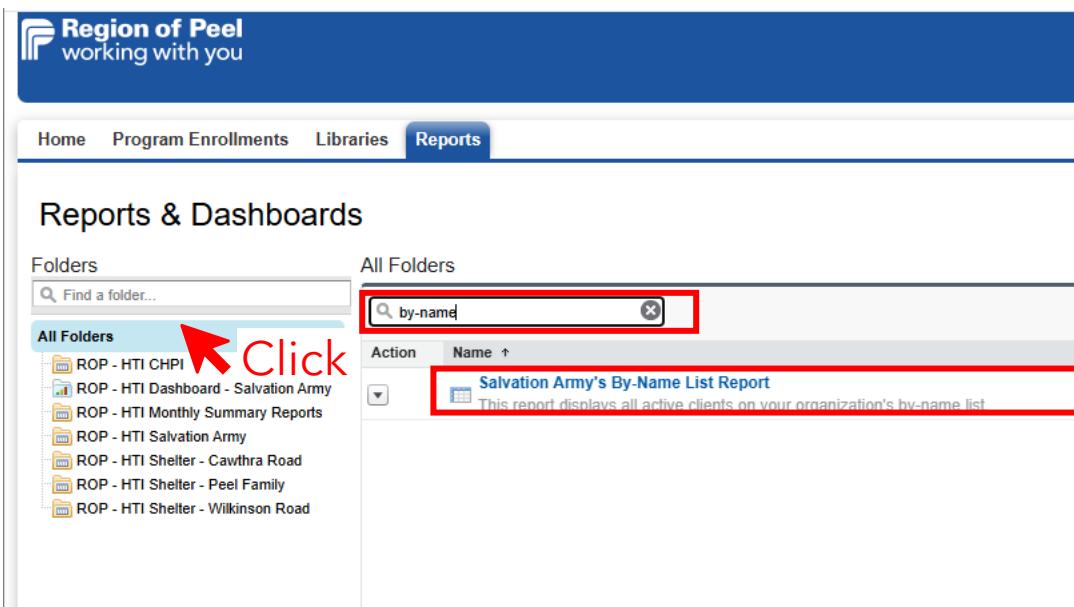
Maintaining client file: updating last contact date

From the home page click on the *Reports* tab near the top.



The screenshot shows the Region of Peel website with a blue header. The 'Reports' tab is highlighted with a red box. The left sidebar shows 'Welcome' and 'Justin gander', and buttons for 'Collapse Menu', 'Client Intake', and 'Create Shelter Intake'. The main content area says 'This page has been deprecated.'

Make sure "All Folders" is selected and in the middle search bar type in "By Name List". Click on the report.



The screenshot shows the 'Reports & Dashboards' page. The 'Folders' section on the left has a red arrow pointing to the 'All Folders' link, with the word 'Click' written next to it. The search bar in the 'All Folders' section is highlighted with a red box and contains the text 'by-name'. Below the search bar, a report titled 'Salvation Army's By-Name List Report' is listed, also highlighted with a red box. The report description says 'This report displays all active clients on your organization's by-name list.'

You will be directed to the report page. From here you can view all of your active clients on the By Name List. From here you can access your client's BNL record directly to make any updates.

For more information visit peelregion.ca

 **Salvation Army's By-Name List Report**

Report Generation Status: Complete

Report Options:

Summarize information by:

-None-

Show

All program enrollments

Time Frame

Date Field

Baby Due Date

Range

Custom

From

To

[Run Report](#)
[Hide Details](#)
[Printable View](#)
[Export Details](#)

Filtered By:

 Program Enrollment: Record Type equals HET : Housing By Name List Entry
 AND BNL Created Date greater or equal 01/03/2025

Program Enrollment Members: Program Enrollment Members Ref	Program Enrollment: Enrollment Name	By-Name List Creation	Last Contacted Date
PEM-500746	Gordon Greysen - Housing BNL	03/03/2025	-
PEM-500748	Ryan Reynolds - Housing BNL	03/03/2025	-
PEM-500762	Austin Powers - Housing BNL	04/03/2025	-
PEM-500763	Parbhi Walli - Housing BNL		
PEM-500766	Boris Todbringer - Housing BNL		
PEM-500781	adfafda adfafda - Housing BNL		
PEM-500784	Tabitha Newberry - Housing BNL	13/03/2025	-
PEM-500787	Jamie Brightwater - Housing BNL	14/03/2025	-
PEM-500804	Vic Hoss - Housing BNL	18/03/2025	-
PEM-500805	Vic Hoss - Housing BNL	18/03/2025	-
PEM-500808	Felicia Starlight - Housing BNL	19/03/2025	-
PEM-500811	Garth Brooks - Housing BNL	19/03/2025	-
PEM-500817	Joe Schmo - Housing BNL	20/03/2025	-
PEM-500825	Liam O'Connor - Housing BNL	21/03/2025	-
PEM-500827	Liam o'Connor - Housing BNL	21/03/2025	-
PEM-500838	Felicia Starlight - Housing BNL	24/03/2025	-

Grand Totals (16 records)


 Click to access client record

You will be directed to the client's BNL program enrollment page. Navigate your cursor to the "Last Contacted Date" field on the page. Highlight the field until you see a pencil symbol .

Program Enrollment Detail

[Edit](#) [Sharing](#)

[ASSESSMENT](#) [CREATE BNL NEEDS ASSESSMENT](#) [DEACTIVATE SERVICE](#) [ADD MEMBER](#) [REMOVE MEMBER](#) [CLIENT REAPPLICATION](#) [UPDATE CLIENT INFORMATION](#)

Primary Case Owner	Justin Gander	Add Category	
Housing Coordinated Access Service	Gordon Greysen - Coordinated Housing Access	Record Type	HET : Housing By Name List Entry (Change)
Assigned Contributor	Justin Gander	Master Program Enrollment	Gordon Greysen - Housing Services
Housing Status When Case Closed		Owner	Justin Gander (Change)
By Name List Reason for Closure		Status	
Enrollment Name	Gordon Greysen - Housing BNL	PE Close Reason	
Program	Gordon Greysen	Stage	
Primary Applicant	Gordon Greysen	Close Date	
Primary Contact Email		Type	Homelessness Support
Primary Applicant Mobile Phone		Assigned to	
Preferred Contact	23	Inactive	<input type="checkbox"/>
Days Since Application Filed		Reason for deactivation	
Client Admission Effective Date		Date of Inactivation	
PE Origin		By-Name List Creation	03/03/2025
Consent Type	None	Household Members	1
Provider	Salvation Army of Peel	Household Income	
Screening Details		Last Contacted Date	
ODSP Benefit			
Ontario Works Benefit			
Additional Information			
Housing Assessment			
Family Composition			
Unique Key		HOU-290772-PE	

 For more information visit peelregion.ca

Double click the field to edit its information. A calendar will pop up for you to enter the date. Click “Today” at the bottom of the calendar if you want to enter today’s date automatically.

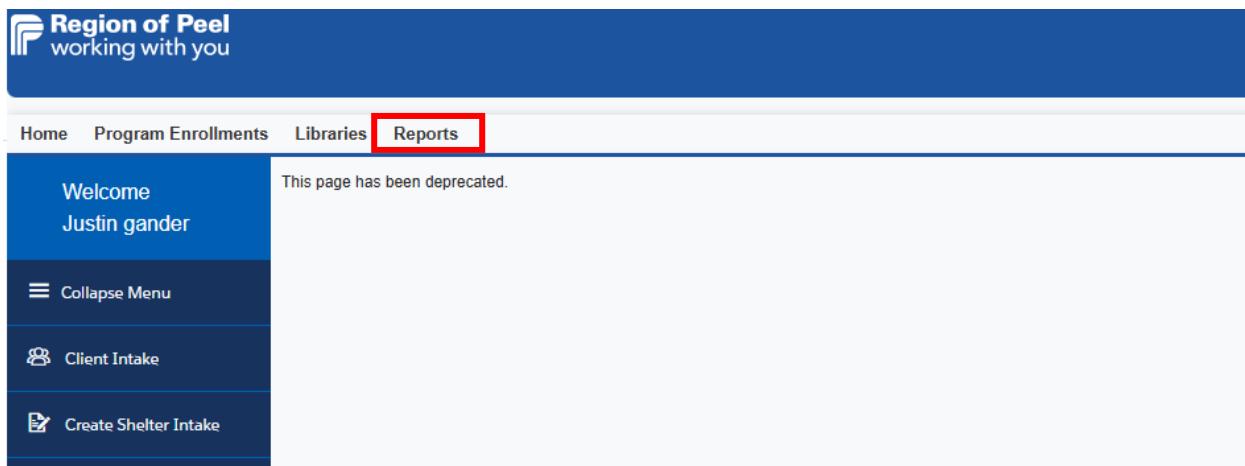
By-Name List Creation 03/03/2025

Household Members	<input type="text" value="March"/> <input type="button" value="▼"/> <input type="button" value="▼"/> 2025																																																	
Household Income	<table border="1"><tr><td>Sun</td><td>Mon</td><td>Tue</td><td>Wed</td><td>Thu</td><td>Fri</td><td>Sat</td></tr><tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>1</td></tr><tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr><tr><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr><tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td></tr><tr><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr></table>	Sun	Mon	Tue	Wed	Thu	Fri	Sat	23	24	25	26	27	28	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5
Sun	Mon	Tue	Wed	Thu	Fri	Sat																																												
23	24	25	26	27	28	1																																												
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9	10	11	12	13	14	15																																												
16	17	18	19	20	21	22																																												
23	24	25	26	27	28	29																																												
30	31	1	2	3	4	5																																												
Primary Member	<input type="button" value="Today"/>																																																	
Last Contacted Date	<input type="text"/>																																																	

For more information visit peelregion.ca

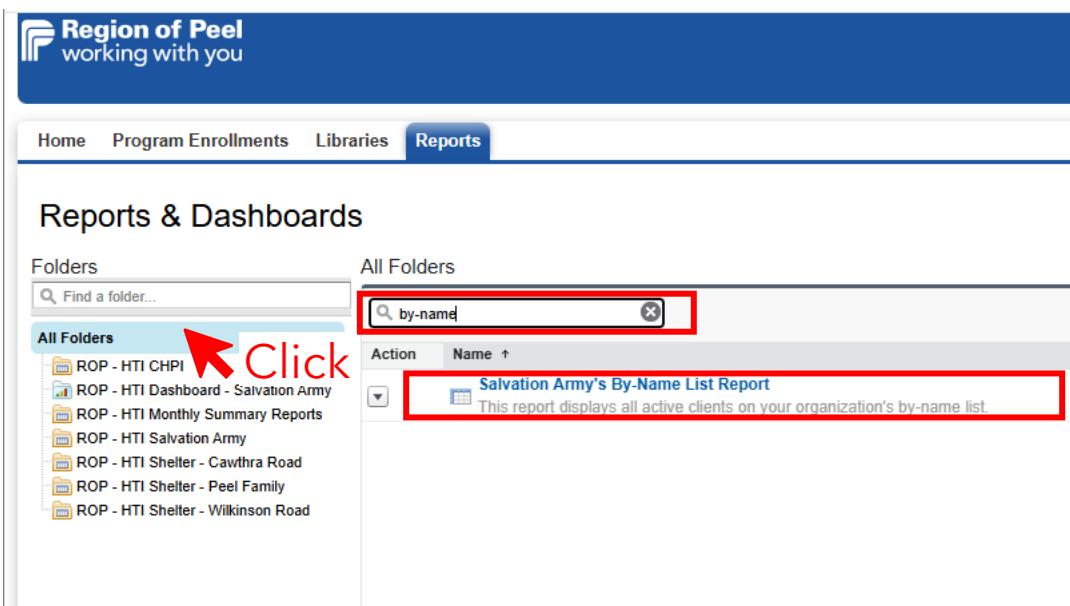
Maintaining client file: editing client information

From the home page click on the *Reports* tab near the top.



The screenshot shows the Region of Peel website with a blue header. The 'Reports' tab is highlighted with a red box. The left sidebar shows 'Welcome' and 'Justin gander', and a 'Collapse Menu' button. The main content area says 'This page has been deprecated.'

Make sure "All Folders" is selected and in the middle search bar type in "By Name List". Click on the report.



The screenshot shows the 'Reports & Dashboards' page. The 'Folders' sidebar has 'All Folders' selected. The search bar contains 'by-name'. The report list shows 'Salvation Army's By-Name List Report' with a red box around it. A large red arrow points to the 'All Folders' button in the sidebar.

You will be directed to the report page. From here you can view all of your active clients on the By Name List. From here you can access your client's BNL record directly to make any updates.

For more information visit peelregion.ca

 **Salvation Army's By-Name List Report**

Report Generation Status: Complete

Report Options:

Summarize information by:

-None-

Show

All program enrollments

Time Frame

Date Field

Baby Due Date

Range

Custom

From

To

[Run Report](#)
[Hide Details](#)
[Printable View](#)
[Export Details](#)

Filtered By:

 Program Enrollment: Record Type equals HET : Housing By Name List Entry
 AND BNL Created Date greater or equal 01/03/2025

Program Enrollment Members: Program Enrollment Members Ref	Program Enrollment: Enrollment Name	By-Name List Creation	Last Contacted Date
PEM-500746	Gordon Greysen - Housing BNL	03/03/2025	-
PEM-500748	Ryan Reynolds - Housing BNL	03/03/2025	-
PEM-500762	Austin Powers - Housing BNL	04/03/2025	-
PEM-500763	Parbhi Walli - Housing BNL	07/01/2025	-
PEM-500766	Boris Todbringer - Housing BNL	04/03/2025	-
PEM-500781	adfafda adfafd - Housing BN		
PEM-500784	Tabitha Newberry - Housing		
PEM-500787	Jamie Brightwater - Housing		
PEM-500804	Vic Hoss - Housing BNL		
PEM-500805	Vic Hoss - Housing BNL	18/03/2025	-
PEM-500808	Felicia Starlight - Housing BNL	19/03/2025	-
PEM-500811	Garth Brooks - Housing BNL	19/03/2025	-
PEM-500817	Joe Schmo - Housing BNL	20/03/2025	-
PEM-500825	Liam O'Connor - Housing BNL	21/03/2025	-
PEM-500827	Liam o'Connor - Housing BNL	21/03/2025	-
PEM-500838	Felicia Starlight - Housing BNL	24/03/2025	-

Grand Totals (16 records)

 Click to access client record

You will be directed to the client's BNL program enrollment page. From this page, navigate to the "Program Enrollment Members" section by scrolling down the page.

[ASSESSMENT](#) [CREATE BNL NEEDS ASSESSMENT](#) [DEACTIVATE SERVICE](#) [ADD MEMBER](#) [REMOVE MEMBER](#) [CLIENT REAPPLICATION](#) [UPDATE CLIENT INFORMATION](#)

Primary Case Owner	Justin Gander	Add Category	
Housing Coordinated Access Service	Gordon Greysen - Coordinated Housing Access	Record Type	HET - Housing By Name List Entry [Change]
Assigned Contributor	Justin Gander	Master Program Enrollment	Gordon Greysen - Housing Services
Housing Status When Case Closed		Owner	Justin Gander (Change)
By Name List Reason for Closure		Status	
Enrollment Name	Gordon Greysen - Housing BNL	PE Close Reason	
Program		Stage	
Primary Applicant	Gordon Greysen	Close Date	
Primary Contact Email		Type	Homelessness Support
Primary Applicant Mobile Phone		Assigned to	
Preferred Contact		Inactive	<input type="checkbox"/>
Days Since Application Filed	23	Reason for deactivation	
Client Admission Effective Date		Date of deactivation	
PE Origin		By-Name List Creation	03/03/2025
Consent Type	None	Household Members	1
Provider	Salvation Army of Peel	Household Income	
Screening Details		Primary Member	
ODSP Benefit		Last Contacted Date	
Ontario Works Benefit			
Additional Information			
Housing Assessment			
Family Composition			
Unique Key			

 Scroll down

 For more information visit peelregion.ca

Click on the reference number hyperlink of the client.

Action	Program Enrollment Members Ref	Member Name	Relationship to Main Applicant	Member Status
Edit	PEM-500746	Gordon Greysen	Primary	Active

To edit information about the client, just highlight the field you want to edit until the pencil icon becomes visible 

Home Program Enrollments Libraries Reports

[Back to Program Enrollment: Gordon Greysen - Housing BNL](#)

 **PEM-500746**

[« Back to Program Enrollment: Gordon Greysen - Housing BNL](#)

[Program Enrollment Members History \(1\)](#) | [Member History \(0\)](#) | [Placements \(0\)](#)

Program Enrollment Members Detail

[Edit](#)

Information

Program Enrollment Members Ref	PEM-500746	Ontario Works Member Id	
Member Name	Gordon Greysen	ODSP Member ID	
Program Enrollment	Gordon Greysen - Housing BNL	Where to find ?	
Member	Gordon Greysen	Time of day	
Member Role		Racialized Person	
Member First Name	Gordon	Indigenous Person	
Member Last Name	Greysen	Veteran Status	Yes - Canadian Armed Forces
First Name	Gordon	Marital Status	Single
Middle Name		Sexual Orientation	
Last Name	Greysen	Immigration Status	Canadian Citizen
Member Status	Active	Port Of Entry	
Placement Status		Year of Immigration	
Gender		Immigration Years	
Date of Birth	01/03/2000	NewComer	
Age	25	Household Member Immigration Status	
Full Time Student	<input type="checkbox"/>	Income source	
Relationship to Main Applicant	Primary	Gross Monthly Income	
Reason for Assistance		Lives at this address?	<input type="checkbox"/>
Country of Birth	Canada	Total Assets	
Preferred Language		Months homeless in past 12 Mths	

Once you're finished with the edits, please make sure to click the **Save** button that appears at the top of the page.

For more information visit peelregion.ca

[Back to Program Enrollment: Gordon Greyson - Housing BNL](#)

Program Enrollment Members

PEM-500746

[« Back to Program Enrollment: Gordon Greyson - Housing BNL](#)[Program Enrollment Members History](#) **Program Enrollment Members Detail**

▼ Information

Program Enrollment Members Ref	PEM-500746
Member Name	Gordon Greyson
Program Enrollment	Gordon Greyson - Housing BNL
Member	Gordon Greyson
Member Role	
Member First Name	Gordon
Member Last Name	Greyson
First Name	Gordon
Middle Name	
Last Name	Greyson
Member Status	Active
Placement Status	
Gender	
Date of Birth	01/03/2000
Age	25
Full Time Student	<input type="checkbox"/>
Relationship to Main Applicant	Primary
Reason for assistance	
Country of Birth	<input type="text" value="Bahamas"/>
Preferred Language	
Self Service Opt In	<input type="checkbox"/>

To go back to the client's BNL program enrollment page, click on the hyperlink next to the Program Enrollment field.

For more information visit [peelregion.ca](#)

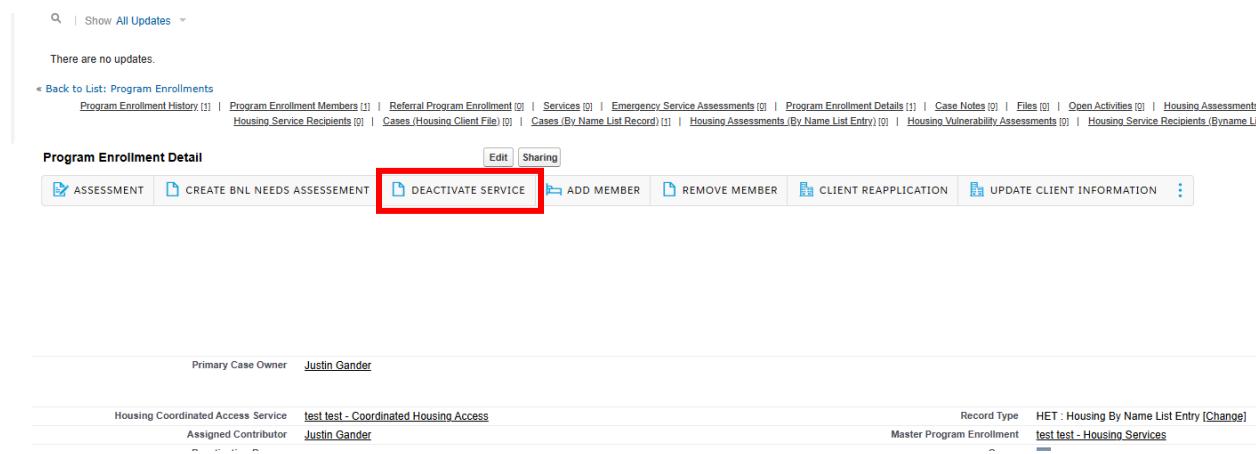
[Back to Program Enrollment: Coby Cancun - Housing BNL](#)Program Enrollment Members
PEM-500850[« Back to Program Enrollment: Coby Cancun - Housing BNL](#)[Program Enrollment Members History \[2\]](#) |**Program Enrollment Members Detail**[Edit](#)**▼ Information**

Program Enrollment Members Ref	PEM-500850
Member Name	Coby Cancun
Program Enrollment	Coby Cancun - Housing BNL
Member	<u>Coby Cancun</u>
Member Role	
Member First Name	Coby
Member Last Name	Cancun
First Name	Coby
Middle Name	
Last Name	Cancun
Member Status	Active
Placement Status	
Gender	
Date of Birth	01/03/2000
Age	25
Full Time Student	<input type="checkbox"/>
Relationship to Main Applicant	Primary
Reason for assistance	
Country of Birth	Bahrain
Preferred Language	
Self Service Opt In	<input type="checkbox"/>
Emergency Contact	

For more information visit peelregion.ca

Closing a Client's BNL file

From a client's BNL program enrollment page, at the top of the page, click on the button **Deactivate Service**.



The screenshot shows a software interface for managing program enrollments. At the top, there is a navigation bar with links like 'Program Enrollment History', 'Program Enrollment Members', 'Referral Program Enrollment', 'Services', 'Emergency Service Assessments', 'Program Enrollment Details', 'Case Notes', 'Files', 'Open Activities', 'Housing Assessments', 'Housing Service Recipients', 'Cases (By Name List Record)', 'Housing Assessments (By Name List Entry)', 'Housing Vulnerability Assessments', and 'Housing Service Recipients (By Name List Entry)'. Below the navigation is a sub-menu for 'Program Enrollment Detail' with buttons for 'Edit' and 'Sharing'. A horizontal toolbar contains several icons: 'ASSESSMENT', 'CREATE BNL NEEDS ASSESSMENT', 'DEACTIVATE SERVICE' (which is highlighted with a red box), 'ADD MEMBER', 'REMOVE MEMBER', 'CLIENT REAPPLICATION', and 'UPDATE CLIENT INFORMATION'. Below the toolbar, the 'Primary Case Owner' is listed as 'Justin Gander'. Further down, program details are shown: 'Housing Coordinated Access Service' is 'test test - Coordinated Housing Access', 'Assigned Contributor' is 'Justin Gander', 'Record Type' is 'HET : Housing By Name List Entry [Change]', and 'Master Program Enrollment' is 'test test - Housing Services'. A note at the bottom states 'There are no updates.'

You will be asked the *Reason for Closure*. From the drop-down that appears, select the option that is most applicable. Click **Yes** to proceed.



The screenshot shows a 'Deactivation' dialog box. It asks 'What is the reason for the closure?' and provides a dropdown menu with options: 'Deceased' (which is selected and highlighted with a red box), 'Housed - Family Reunification', 'Housed - Market', 'Housed - Needs-Based Portable Subsidy', 'Housed - Subsidized', 'Housed - Supportive Housing', 'Incarcerated', and 'Left Municipality'. To the right of the dropdown is a blue button with the word 'Yes' in white text, which is also highlighted with a red box.

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You will be directed to a confirmation page. Click **Done** to proceed.

Acknowledgement

Service PE deactivated successfully!

Done

You will be redirected to the client's BNL program enrollment page. The **Inactive** field that is present on the page will show a check mark, indicating that the file has been successfully deactivated.

Housing_Service_Recipients (0) | Cases_(Housing_Client_File) (0) | Cases_(By_Name_List_Record) (0) | Housing_Assessments_(By_Name_List_Entry) (0) | Housing_Vulnerability_Assessments (0) | Housing_Service_Recipients_(Byname_List_Pe) (0)

Program Enrollment Detail [Edit](#)

[ASSESSMENT](#) [CREATE BNL NEEDS ASSESSMENT](#) [REACTIVATE SERVICE](#) [ADD MEMBER](#) [REMOVE MEMBER](#) [CLIENT REAPPLICATION](#) [UPDATE CLIENT INFORMATION](#) [...](#)

Primary Case Owner	Justin Gander	Add Category	
Housing Coordinated Access Service	Green Goblin - Coordinated Housing Access	Record Type	HET - Housing By Name List Entry [Change]
Assigned Contributor	Justin Gander	Master Program Enrollment	Green Goblin - Housing Services
Reactivation Reason		Owner	[Change]
Reactivation Date		PE Applicant Name	Green Goblin
Housing Status When Case Closed	Housed - Family Reunification	Status	
By Name List Reason for Closure		Stage	
Primary Applicant Last Name	Goblin	Close Date	
Days Since BNL Creation	7	Type	Homelessness Support
Days Since Last Contact	7	Assigned to	
Enrollment Name	Green Goblin - Housing BNL	Inactive	<input checked="" type="checkbox"/>
Primary Applicant	Green Goblin	Reason for deactivation	
Primary Contact Email		Date of Inactivation	05/11/2025
Primary Applicant Mobile Phone		By-Name List Creation	29/10/2025
Preferred Contact			
Days Since Application Filed	7		
Client Admission Effective Date			
PE Origin			
Consent Type			
Provider	Salvation Army of Peel		

▼ Screening Details

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What is the difference between the Peel's Coordinated Access report and the By-Name List report?

The key difference between the two is that the Coordinated Access Report allows you to see clients that have been onboarded to the BNL by another service provider, whereas the By-Name List report allows you to see clients that your organization has onboarded to the BNL. Due to privacy barriers, client records on the Coordinated Access Report contain very limited information about the client. The By-Name List Report on the other hand gives you access to more detailed information about your organization's clients

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