PATH Data Entry Workflow

Visual Guide

The Data Entry Workflow found in this document is largely taken from Bowman Systems' document "Workflow for PATH Projects".

Contents

Terms

Contact: An interaction between a PATH-funded worker or workers and an individual who is potentially PATH eligible or enrolled in PATH. Contacts may range from a brief conversation between the street outreach worker and the client about the client's well-being or needs, to a referral to service. A contact may occur in a street outreach setting or a service setting such as an emergency shelter or drop-in center.

Engagement: The point at which an interactive client relationship results in a deliberate client assessment or beginning of a case plan. Engagement is a one-time event, may occur on or after the project entry date, and must occur prior to PATH enrollment and project exit. Clients cannot be enrolled in PATH without being engaged. Although some interactions with a client may result in a positive outcome, without a deliberate client assessment or the beginning of a case plan, those interactions are not considered to be an engagement. All assessment fields must be completed once the client becomes engaged.

Enrollment: A PATH-eligible individual and a PATH provider have mutually and formally agreed to engage in services and the provider has initiated an individual file or record for that individual. Once client is enrolled, Client Enrolled should be listed as "Yes."

Reengagement: The process of reestablishing interaction with PATH-enrolled individuals who are disconnected from PATH services in order to reconnect the client to services based on the previously developed case management or goal plan. Reengagement must occur after enrollment and prior to project exit.

Eligibility: Case workers are not expected to determine eligibility at project entry but must have a reasonable expectation that the person will be eligible.

PATH Program Components

The PATH Program includes two components:

- The **Street Outreach** component of PATH is used by PATH projects that provide outreach and engagement to those living in places **not meant** for human habitation. These PATH activities are designed to meet the immediate needs of unsheltered persons experiencing homelessness by connecting them with emergency shelter, housing, and / or critical health services. Example of person who are living in places **not meant** for habitation are those who sleep on the streets, under bridges, in camps, campgrounds, abandoned buildings, structure meant for animals, vehicles, and public places.
- The **Supportive Services** component of PATH is used by PATH projects to provide outreach and engagement to those living in places **meant** for human habitation. This includes both persons who are residing in shelter, and those doubled-up in housing or at-risk of homelessness.

A client should be entered into the PATH component where they are initially contacted. For example, if a client is first connected to a PATH outreach worker in a homeless camp, they would be entered into the Street Outreach component, even if the client later transitions to emergency shelter. Likewise, if the client is initially seen by a PATH outreach worker at an emergency shelter, they would be entered into the Supportive Services component, even if the client later ends up in a place not meant for human habitation.

Background

The PATH Project workflow starts when the outreach worker meets with a potential client one or more times prior to engaging and enrolling the client into the PATH Project. ServicePoint provides the following fields to track that data:

1. **Current Living Situation Sub-Assessment**
   a. This sub-assessment is used to record each Contact with the client.
   b. It contains entries for Date of Contact and Time (time optional), Start Date, Location, Comments (comments optional), and End Date (end date optional).
   c. The date of the first Contact is the same as the Entry Date.
2. **Date of Engagement**
   a. This is the date the client consented to participate in services provided by the PATH Project.
   b. There should only be one Date of Engagement per enrollment into the PATH Project.
   c. The Date of Engagement must occur on or before the Date of Enrollment.
   d. If the client does not become engaged, no date is recorded.
   e. Client Contacts are still recorded after the Date of Engagement is recorded, until the client is exited from the PATH Project.
3. **PATH Status**
   a. This is a Yes / No question that indicates whether the client has been enrolled in the PATH Project.
   b. If the client has consented to participate in services provided by the PATH Project, then the PATH Status is answered "Yes", and the appropriate Enrollment Date should be recorded.
   c. If a client is not enrolled in PATH, then the PATH Status is answered "No", and the date of the non-enrollment and reason should be recorded.

Following the recommended workflow will ensure that data elements are entered properly into ServicePoint for reporting purposes, and that users are compliant with the requirements outlined in the 2017 HMIS Data Dictionary, Version 1.2, issued June 2017.[2]

Data Entry Workflow

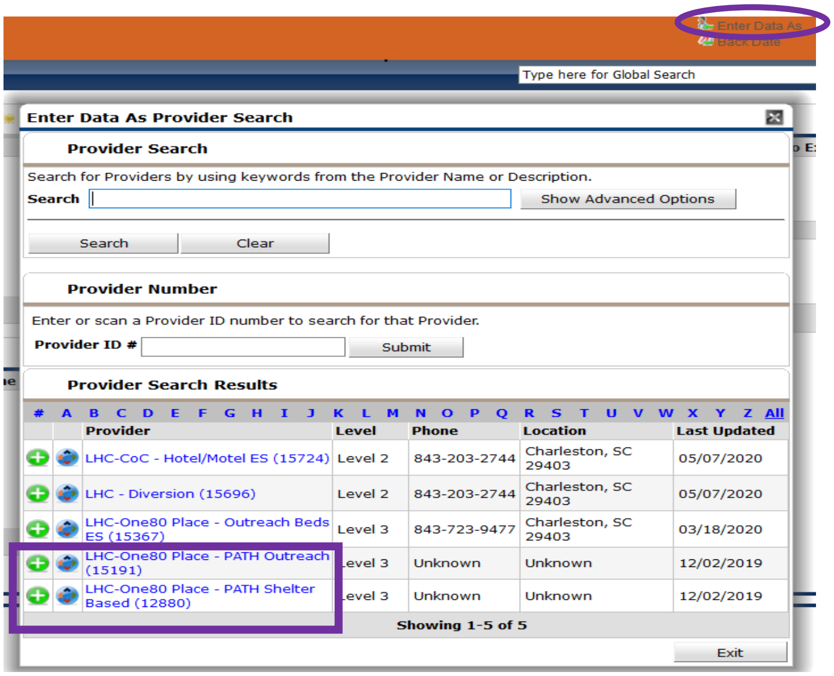
Initial Meeting with Client

This is the initial Point of Contact with the client. In essence, it involves capturing the information about the client's demographics and the number of contacts the outreach worker had with the client before Engagement, and finally, formal Enrollment into the PATH Project.

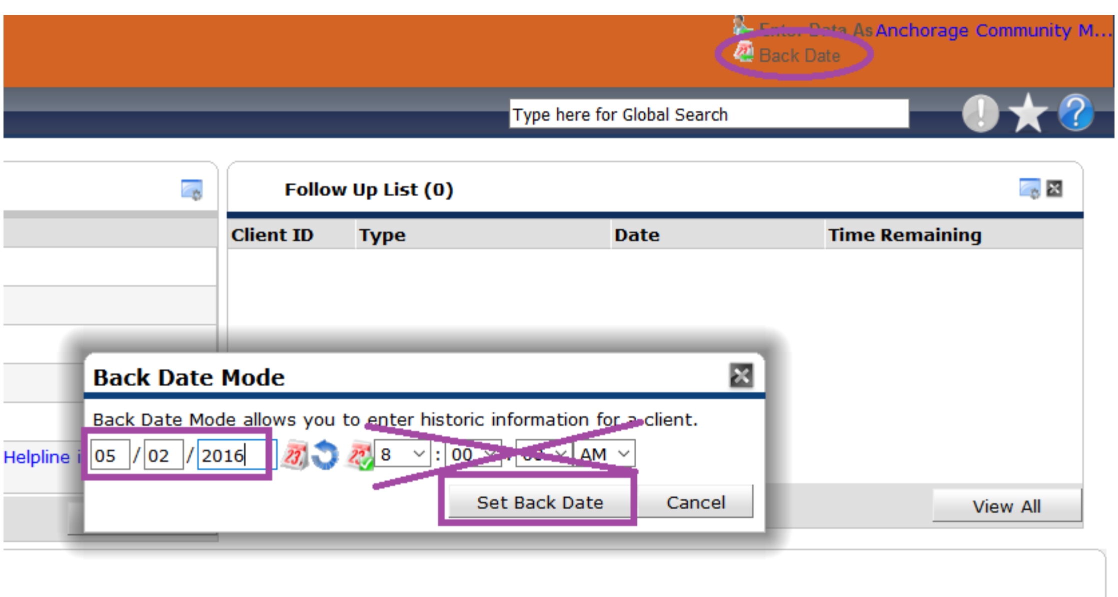
Note: The outreach worker is required to enter all persons contacted into HMIS.

In the past, most projects waited until a client was formally Enrolled into the PATH Project before entering the information into HMIS. With the new reporting structure, all clients who have been contacted for potential enrollment into PATH need to have their data entered into HMIS. In some instances, a person contacted may not even be willing to provide a name. This person will still need to be entered into HMIS. Projects are highly encouraged to collect as much information as possible, but in certain circumstances, it may be necessary to put very rudimentary information into HMIS. In these situations, it is critical that you remember the system client ID that was automatically generated and assigned to the client file. With a lack of client demographics and identifying information, it will be more likely that duplicate client files will be created, which can cause report issues.

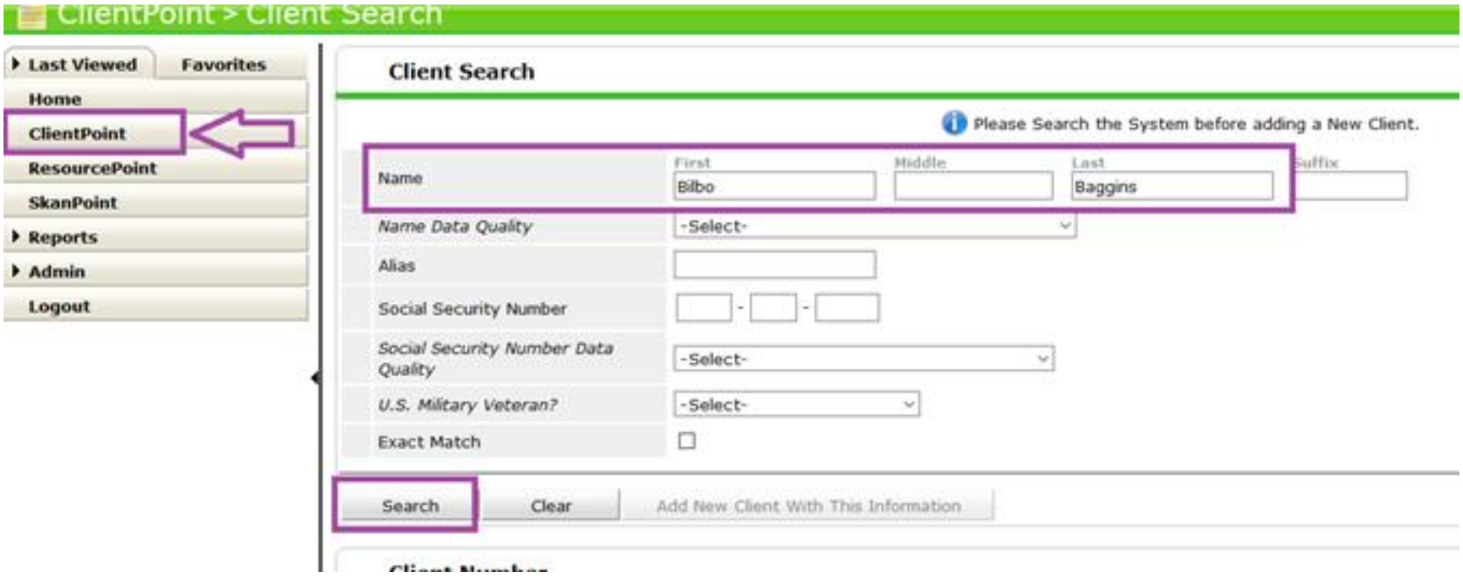
1. **For every person contacted for potential enrollment into the PATH Project, a client profile must be created at first contact.**
   a. Click Enter Data As to select the specific PATH component into which the client is being entered.



   b. Unless you are doing "live time" data entry, click Back Date to select the date that you initially met with the client and gathered the initial information. Only change the date, the time stamp must remain the default if you are using Backdate mode. Click Set Back Date.

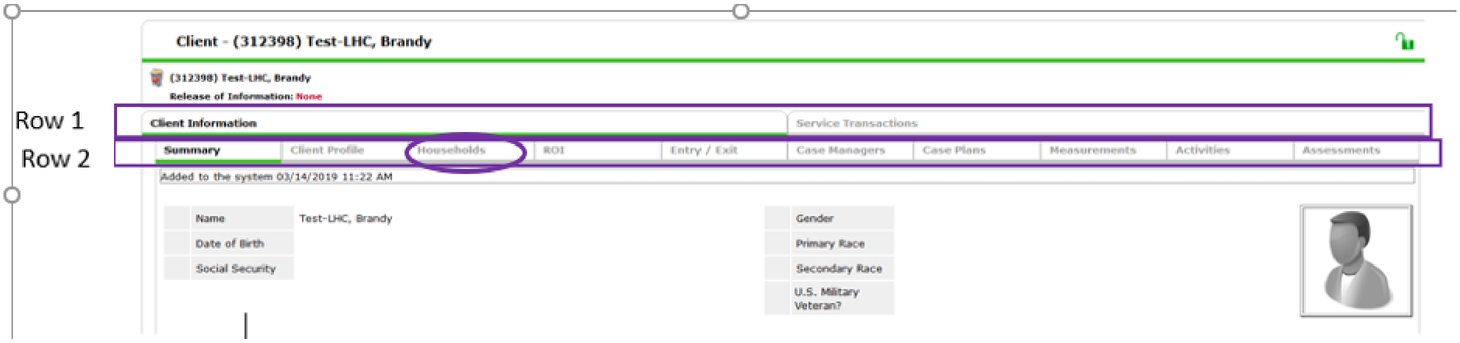


c. Click ClientPoint on the left side of the screen and enter the client's name into the Client Search field. Click Search.

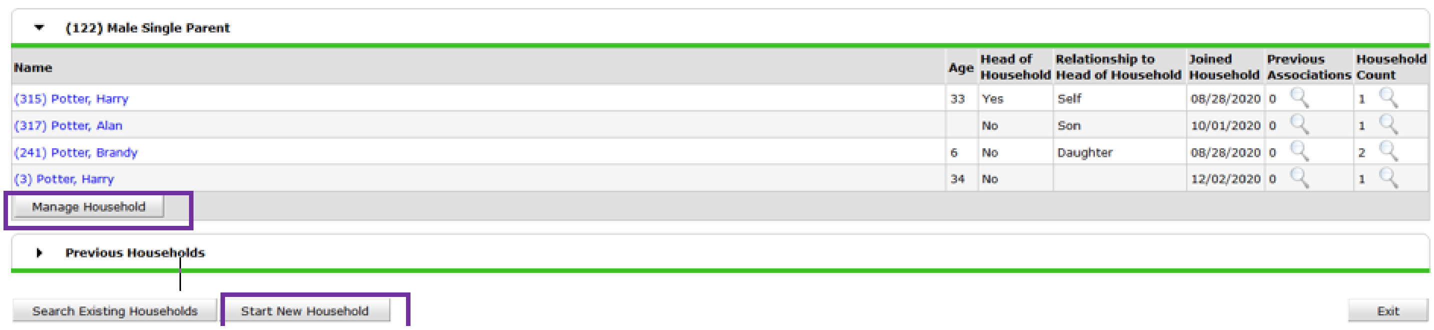


d. Look in Client Results. If there are matches, check to see if it is the same client. If it is, click on the client's name to use that same record. If there are no matches, click Add New Client With This Information.

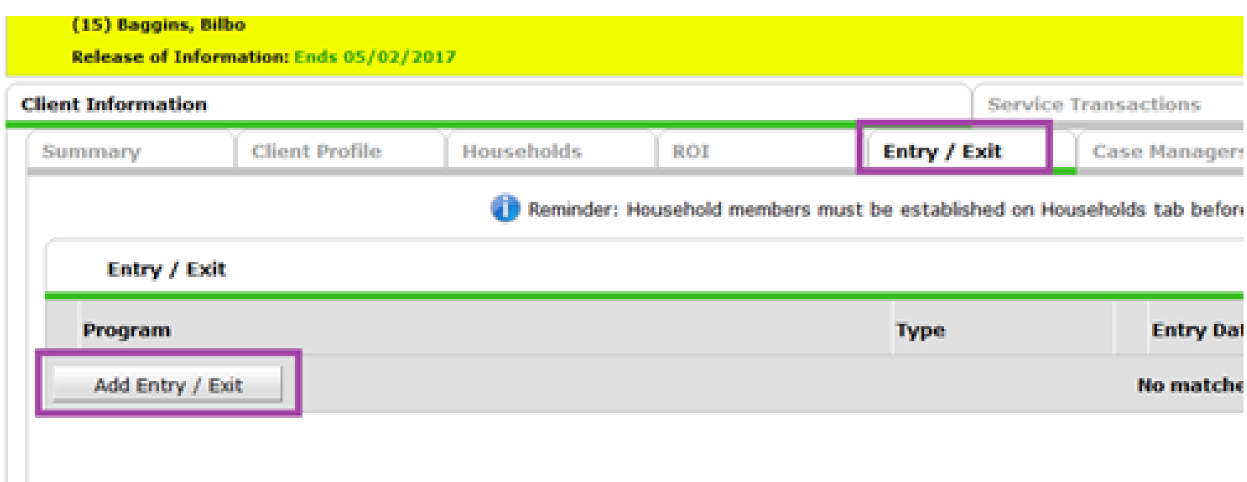
e. Across the top there are two rows of tabs: one row includes the Client Information and Service Transactions tabs. The second row includes the Summary, Client Profile, Households, ROI, Entry / Exit, Case Managers, Case Plans, Measurements, and Assessments. Click on the Households tab.



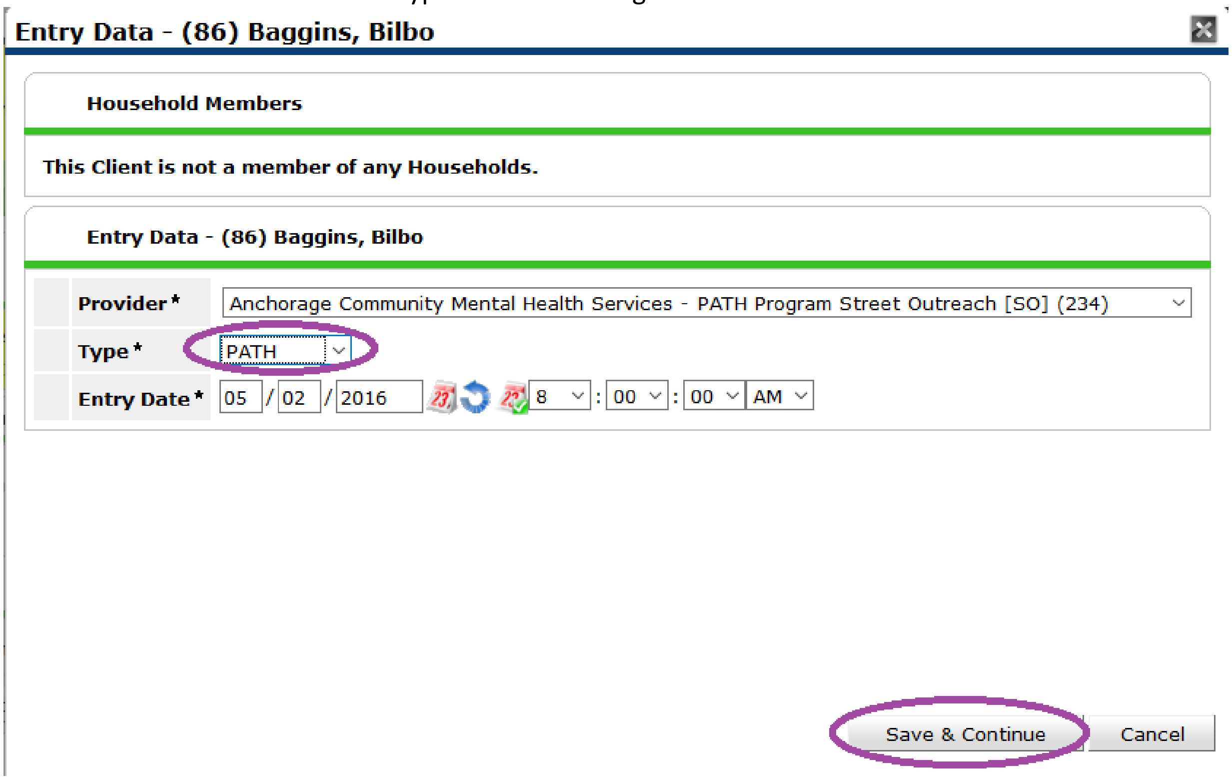
f. If client has a household already listed, verify that the household members listed are correct. To edit the household, click Manage Household. If the client is not already in a household click, Start New Household.



g. Next, click on the Entry / Exit tab. Click Add Entry / Exit.

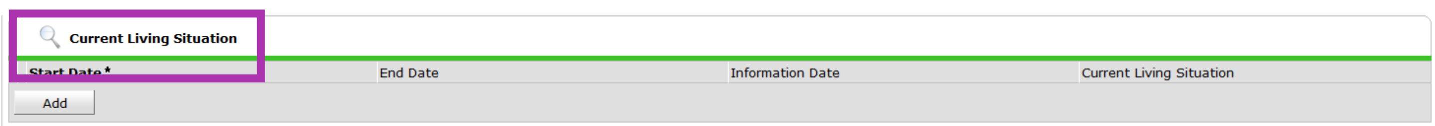


h. Make sure to select PATH as the Type* before clicking Save & Continue.

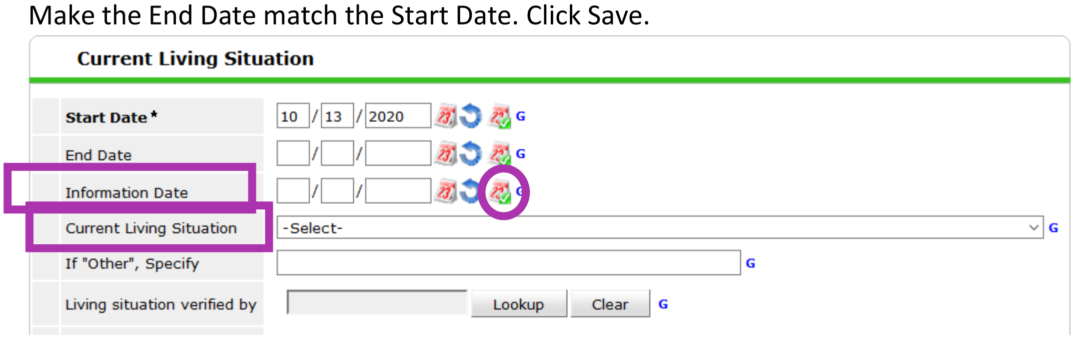


2. **For every client contacted, at first contact, use the Current Living Situation Sub-Assessment to create the Contact.**

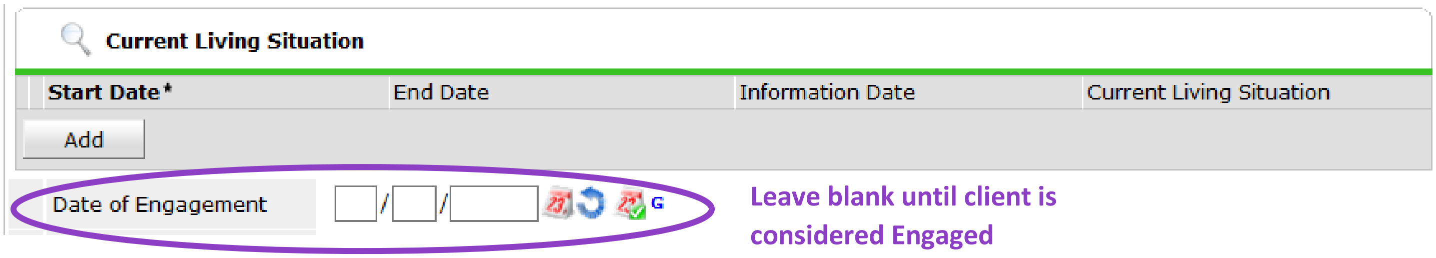
   j. The initial contact with the client should be the same date as the client's Entry Date into the PATH Project. To do this, click Add under the Current Living Situation Sub-Assessment.



   k. Click on the calendar icon with the checkmark to make the Information Date the same as the Entry Date. Select the Current Living Situation from the dropdown list (PATH projects are required to use Place not meant for habitation, Emergency shelter, including hotel or motel paid for with emergency shelter voucher or RHY-funded Host Home shelter, Safe Haven, Other, Worker Unable to determine options. Make the End Date match the Start Date. Click Save.

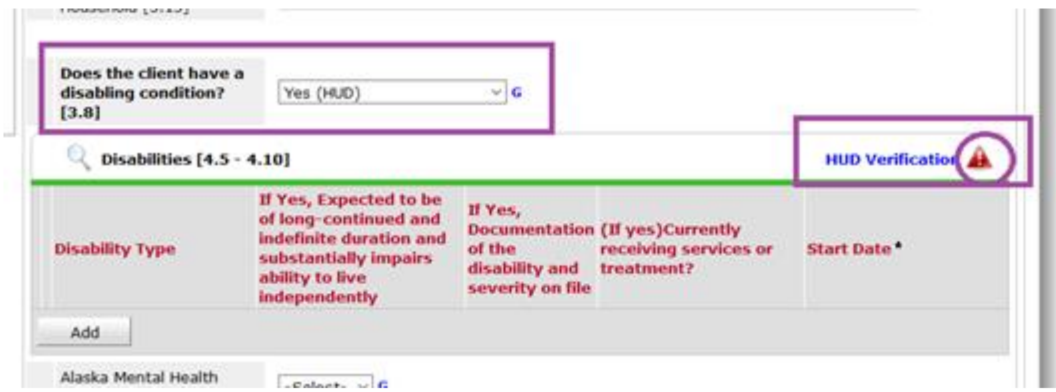


l. If the client is not yet considered Engaged, leave the Engagement Date blank until such time that the client is considered Engaged.

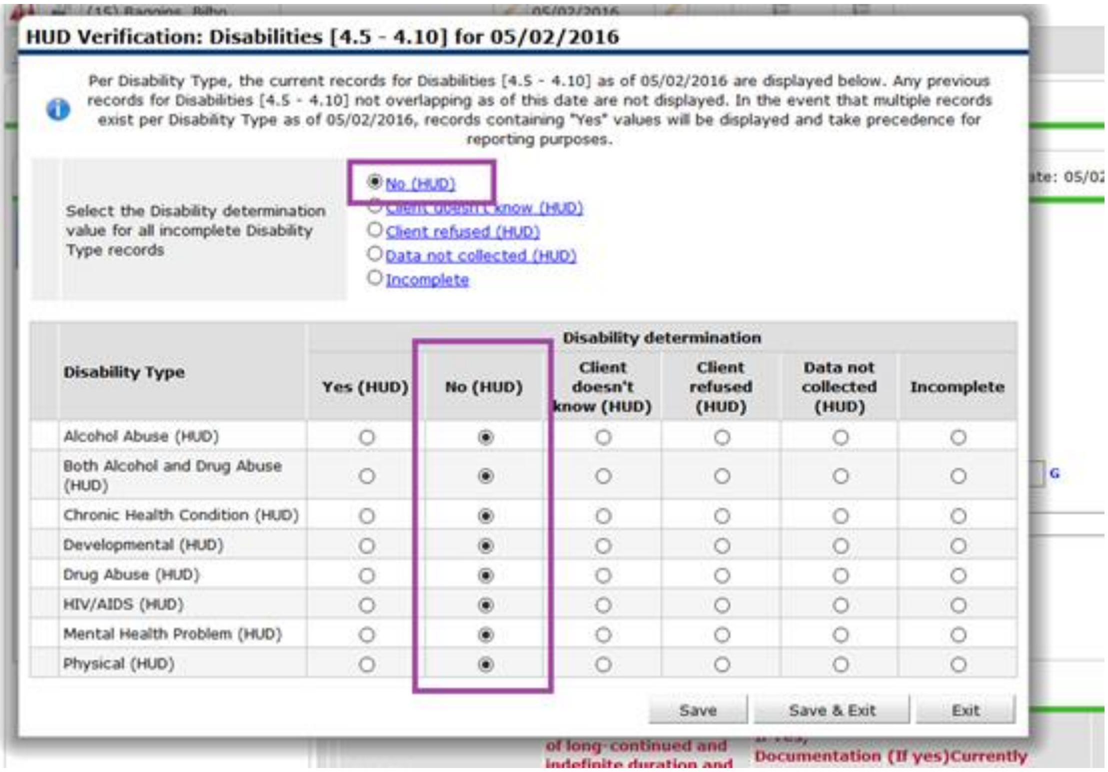


3. Complete the Entry Assessment data elements as thoroughly as possible.

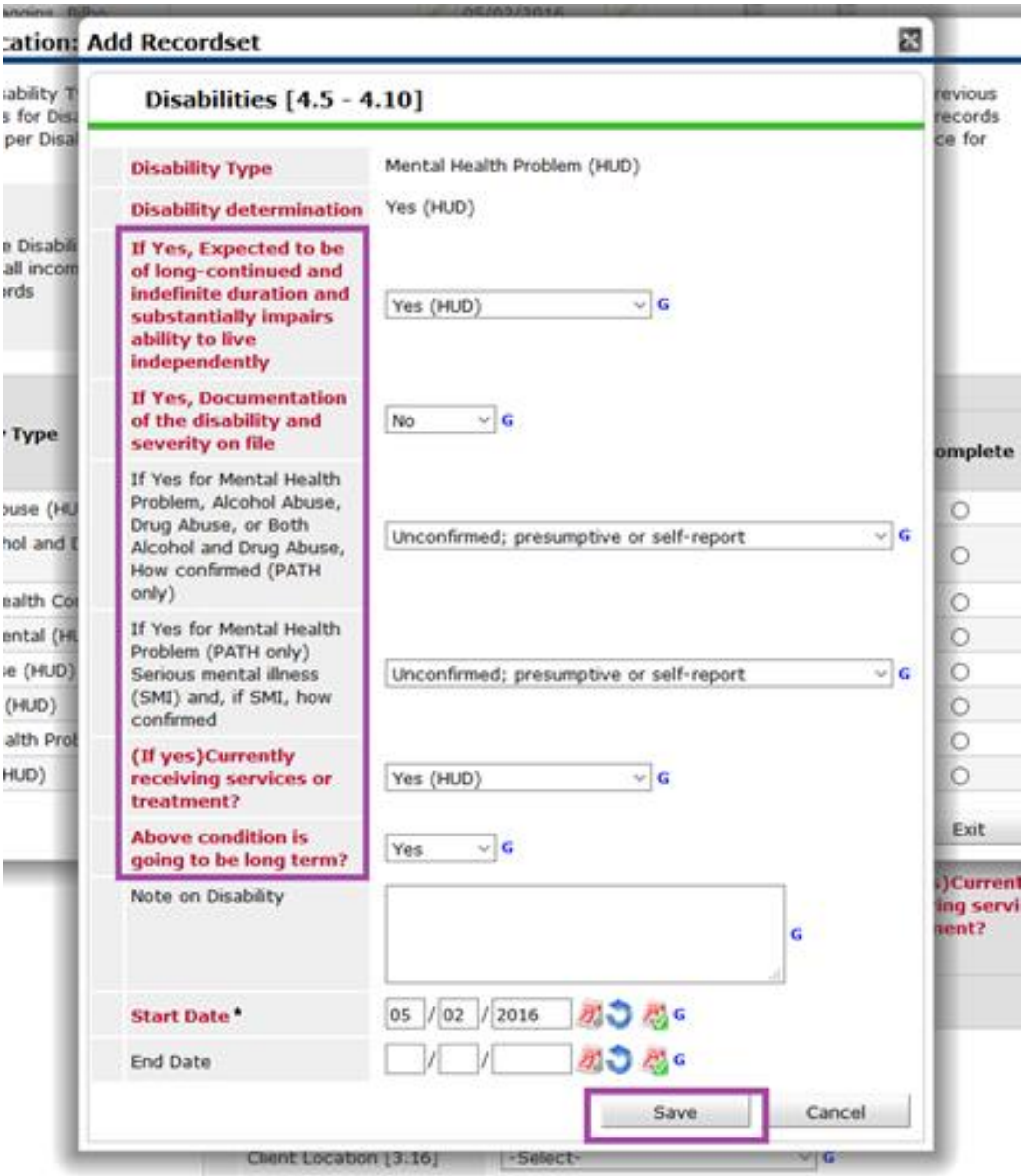
m. Remember that the HUD Verification questions must be answered in a specific way for them to be considered complete. First, answer the Yes / No question – in this example, “Does the client have a disabling condition?” Next, click on the red triangle to the right of HUD Verification.



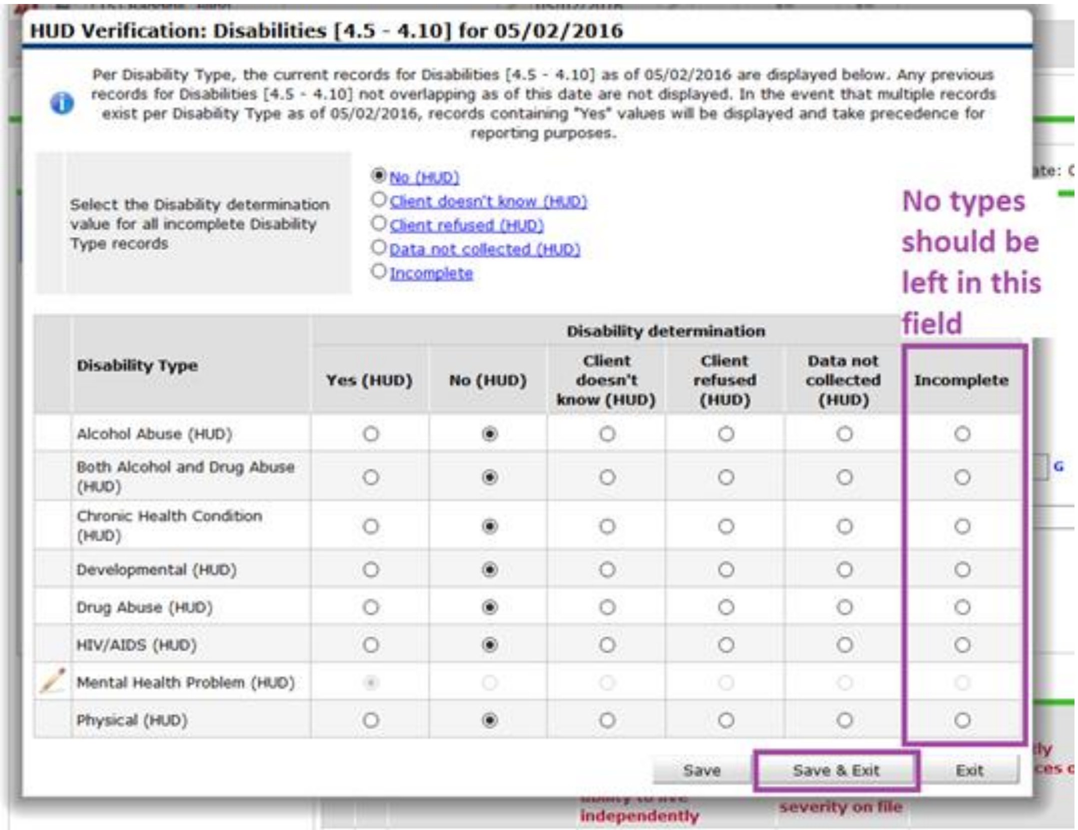
n. With all HUD Verification questions, you must document both the types a client does have and the types they do not have. First, click No at the top of the screen. Doing so will change all the types to No answers.



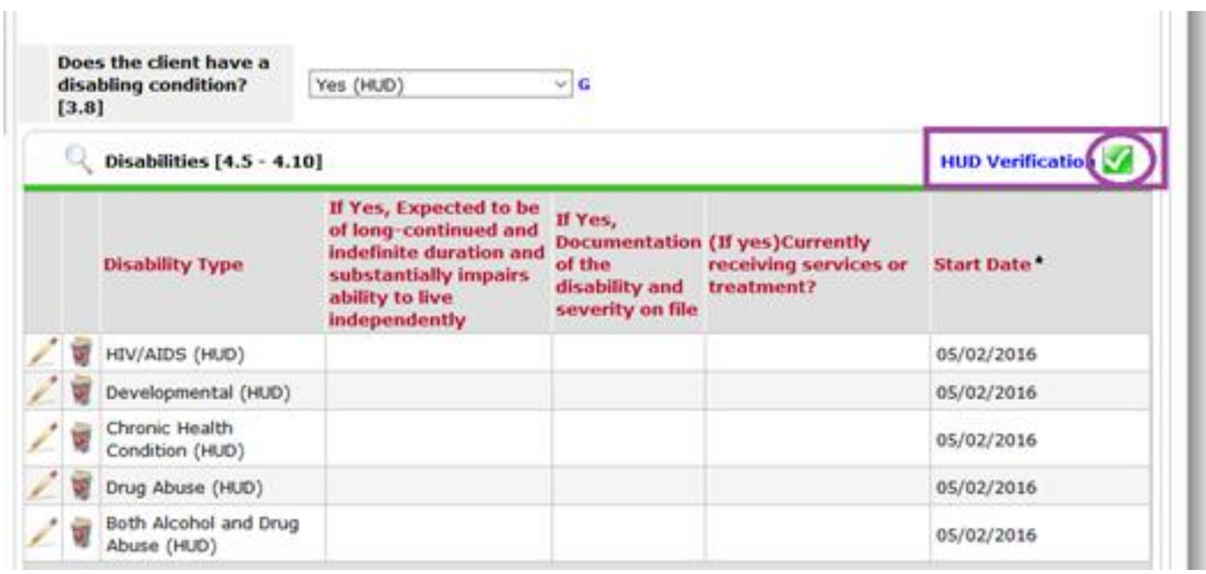
o. Then you simply change the answer to Yes for the type(s) the client does have. For disabilities, when you change a No answer to a Yes answer, an additional sub-assessment opens. Answer all questions within the sub-assessment, then click Save.



p. Once all the types within a HUD Verification question are either answered as Yes or No and none are left Incomplete, click Save & Exit.



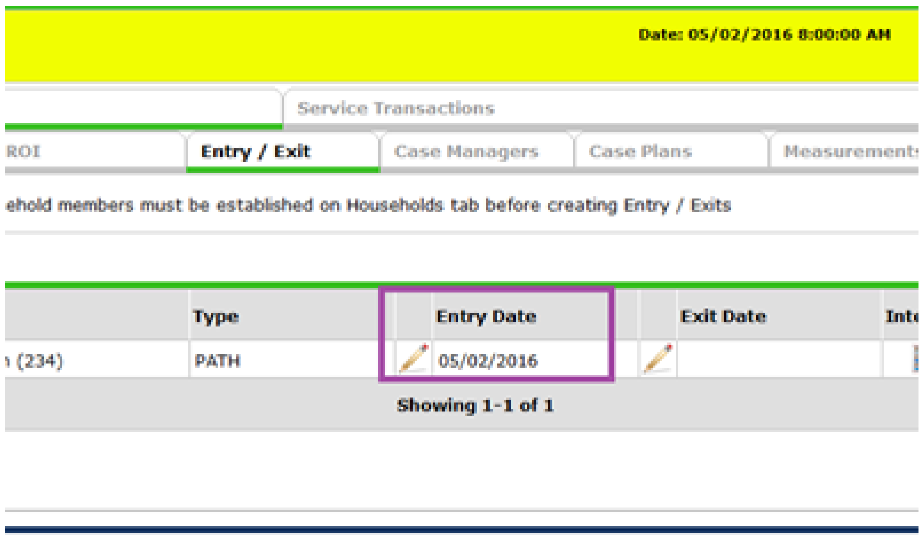
q. The HUD Verification questions are completed when you see the green box with the checkmark next to them.



r. Once the Entry Assessment information is completed, click Save & Exit. This will take you back to the Entry / Exit tab and will show you the date the client entered the project.

Updating Client Information not collected at initial contact

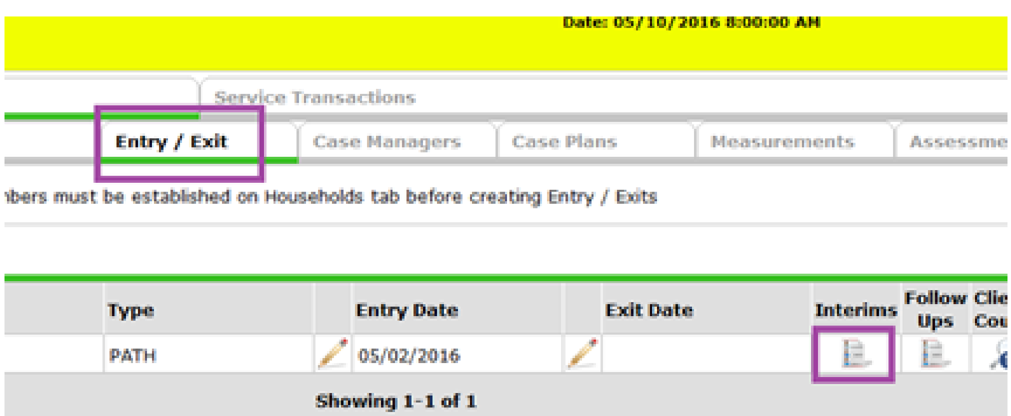
If you need to edit / add information in the Entry Assessment (information that was true at project entry, but was not collected at initial contact), simply return to the Entry / Exit tab and click on the pencil icon next to the Entry Date.



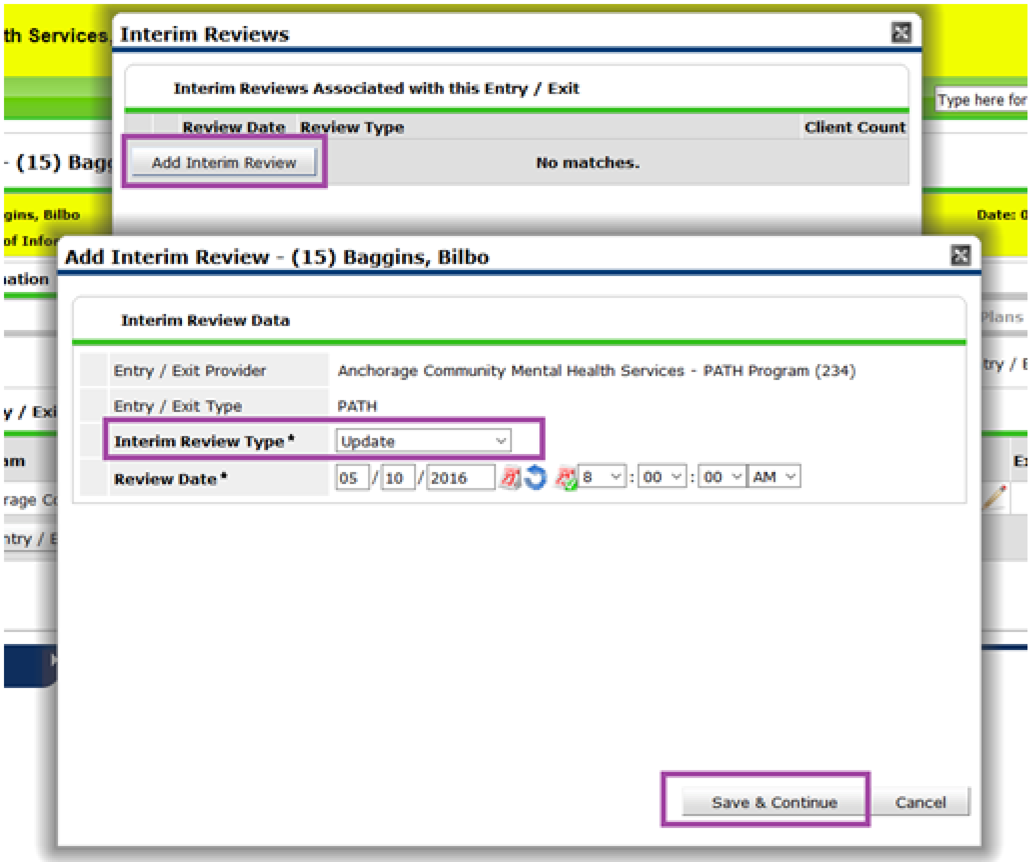
Documenting Contacts

Outreach workers must document every Contact with a client from project Entry Date to project Exit Date. The Current Living Situation sub-assessment must be used to document ***EVERY Contact*** made with a potential PATH participant. In any situation where contact is made more than once in a day, each contact on that day must be recorded.

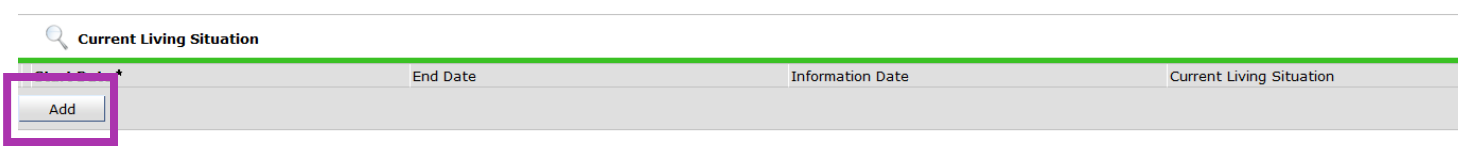
1. **Recording contacts after the initial contact and Project Entry Date**
   a. You will need to create a new Interim Review / Update each time a new Contact needs to be recorded. To do that, navigate to the Entry / Exit tab and click on the icon below Interims.



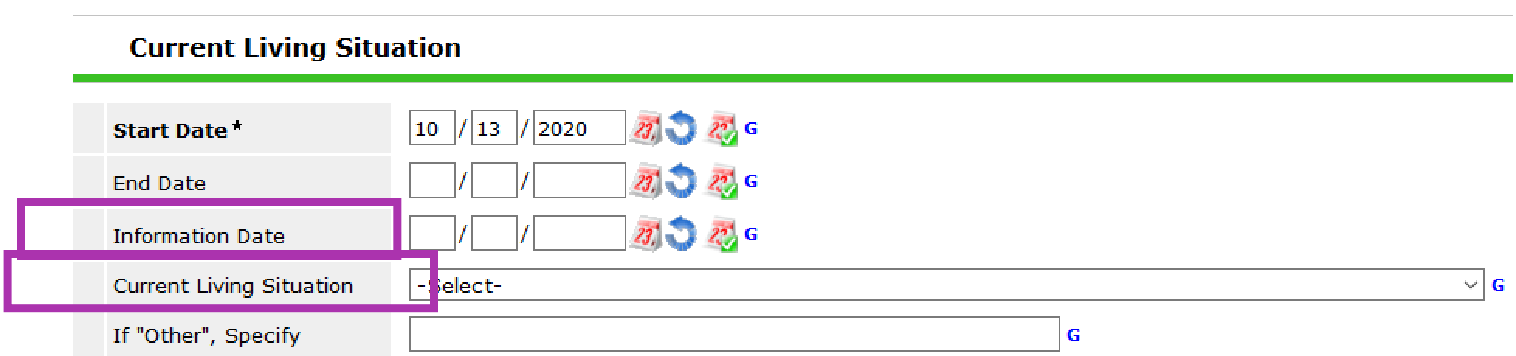
b. Click Add Interim Review. Interim Review Type will be an Update. Click Save & Continue.



c. To record the Contact, click Add under Current Living Situation



d. Again, complete as many Contacts as there are during the entire time the client is in the PATH Project in HMIS. These are recorded under Interim Reviews after the Initial Contact. Complete the same fields: Information Date and Current Living Situation. Click Save.

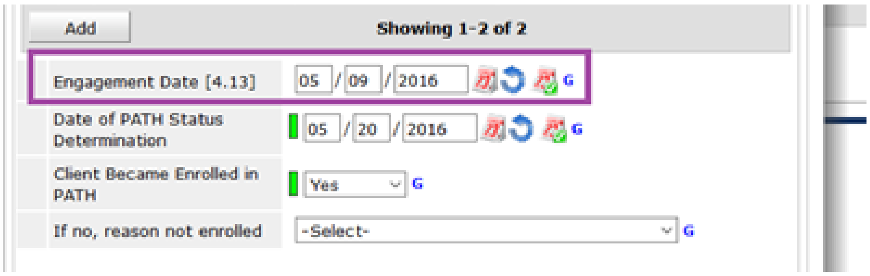


Using Interim Review to Document PATH Engagement and Enrollment

Over time, the outreach worker and client will develop a relationship that leads to Engagement. Once a client has formally agreed to accept PATH services, the client record should be updated to note this in the PATH Status.

Note: The Date of Engagement MUST be on or before the date the client is enrolled in PATH (PATH Status = Yes) and must be after the project start date.

1. **Record the Engagement Date in an Interim Review**



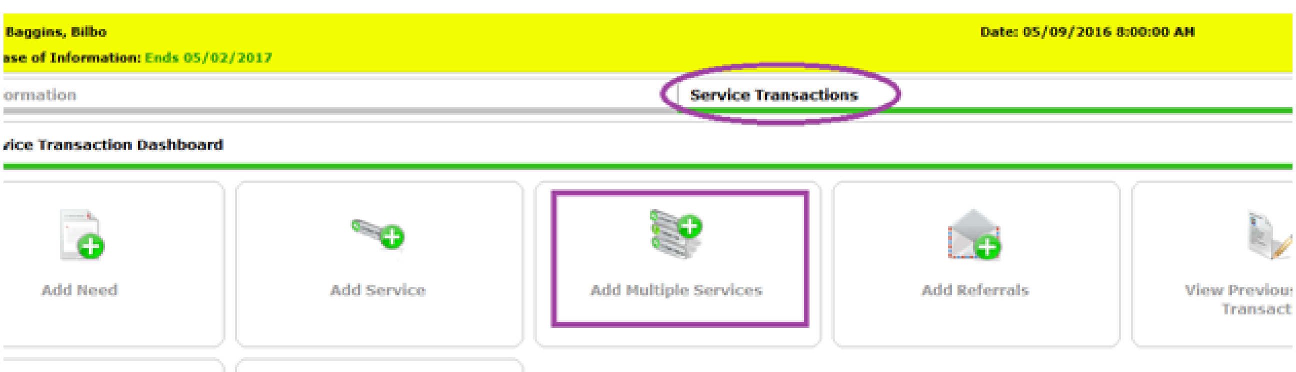
If the client does not enroll in the PATH Project, answer the "Client Became Enrolled in PATH" data element as No. Include the Date of PATH Status Determination. Answer the "If no, reason not enrolled" question.

Provide and Document Services for the Client

Services: A specific PATH-funded assessment, benefit, or form of assistance provided to a PATH-enrolled individual. PATH-funded services may include screening, clinical assessment, community-based mental health services, substance use treatment, and housing assistance. Services are only reported for PATH-funded services provided to a PATH-enrolled individual. A PATH-funded service only needs to be recorded once for the client while entered into the PATH program, but projects are encouraged to enter all services that are provided to PATH-enrolled individuals.

> **Note: It is recommended that the Multiple Services function in ServicePoint be utilized to add services.** This function provides the ability to add many different types of services or the same service many times with different dates.

1. **Add Service Transactions to the client's record**
    a. Click on the Service Transactions tab. Click Add Multiple Services.

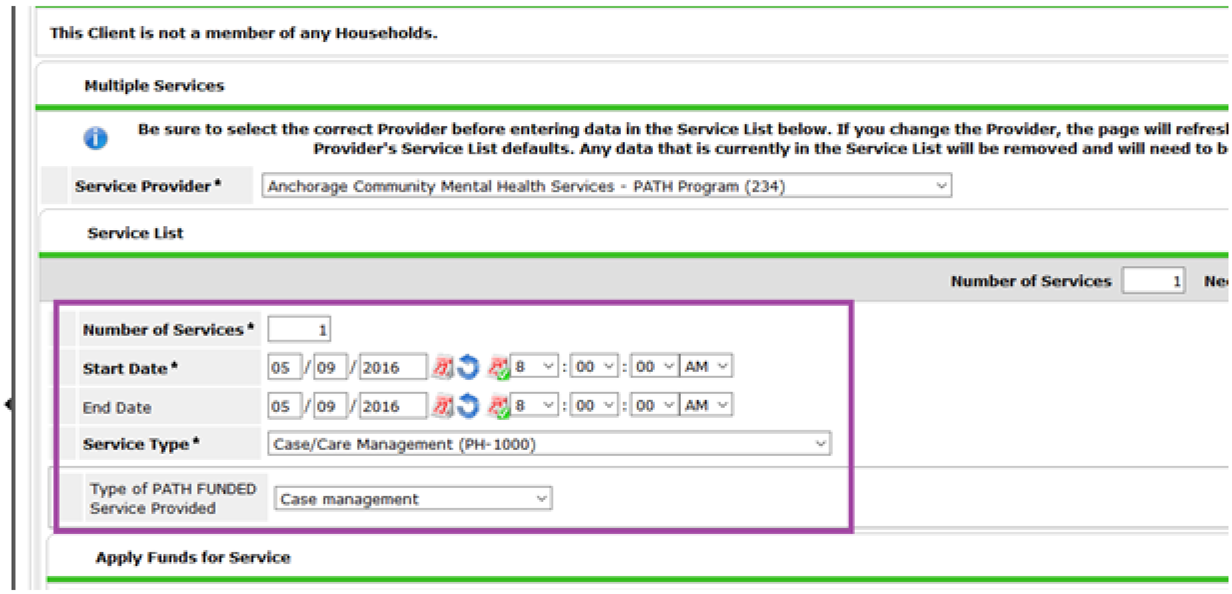


    b. If applicable, change the Number of Services provided, Select the Service Type*, and the Type of PATH FUNDED Service Provided.

*If Type of PATH Funded Service Provided is not answered, the service will not be counted on the PATH Report.

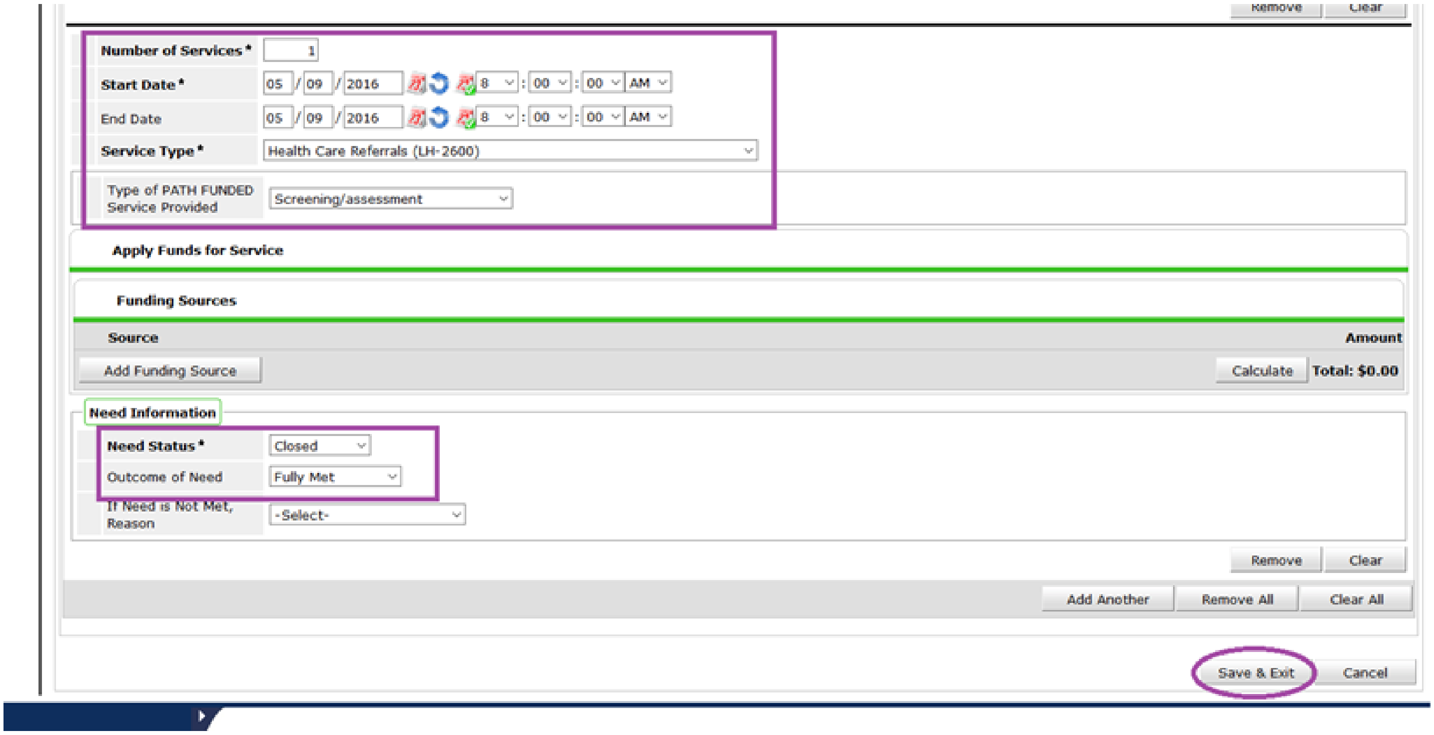
*100% of South Carolina **PATH enrolled** clients are to receive a PATH Funded Service type of "Community Mental Health."

Definition: A range of mental health and/or co-occurring services and activities provided in non-institutional settings to facilitate an individual's recovery. Note: This category does not include case management, alcohol or drug treatment, habilitation, or rehabilitation, as they are standalone services with distinct definitions.



c. Define the Need Status* and Outcome of Need. Click Add Another.

d. Select a different Service Type* or the same Service Type* and change the date, if needed. Select the Type of PATH FUNDED Service Provided. Define the Need Status* and Outcome of Need. Do this as many times as needed to record all services. Once completed, click Save & Exit.



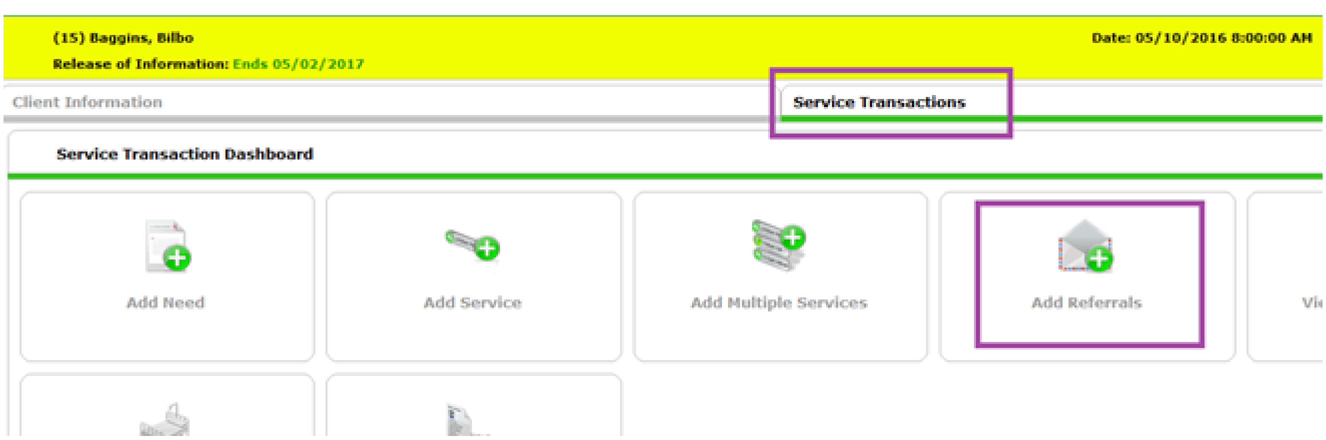
Document and Document Referrals for Services

Referral: Active and direct PATH staff support on behalf of or in conjunction with a PATH-enrolled individual to connect to an appropriate agency, organization, or service. Referrals are only reported for PATH-funded referrals provided to a PATH-enrolled individual.[1] A PATH-funded referral only needs to be recorded once for the client while entered into the PATH program. This documentation is required whether or not the referral was successful in connecting the PATH participant to the service.

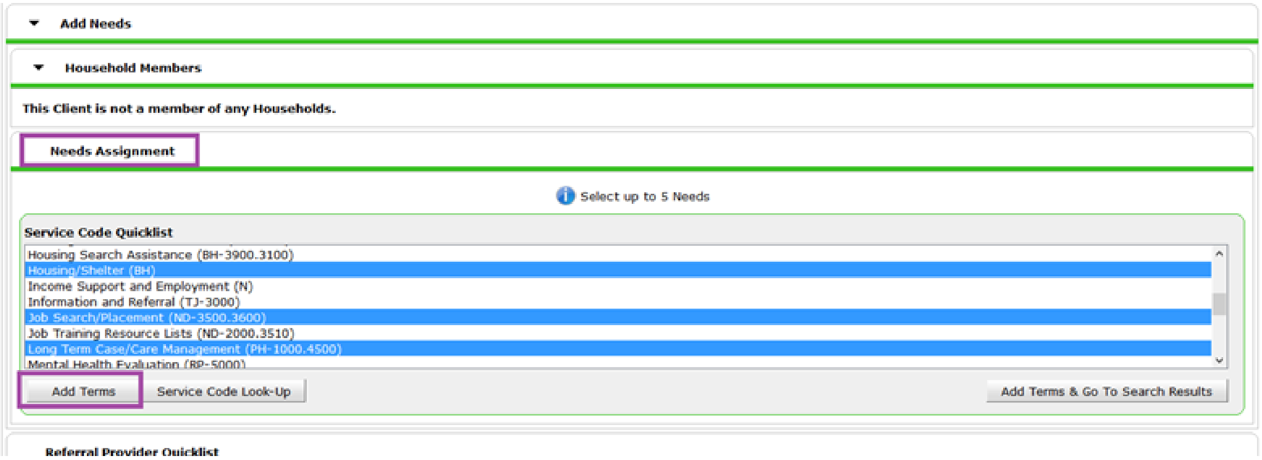
* You must answer the Type of PATH Referral to receive credit for the referral on the PATH report. Additionally, you must track the outcome of the referral, which can be completed when adding the referral initially.

1. Create a Referral for the client

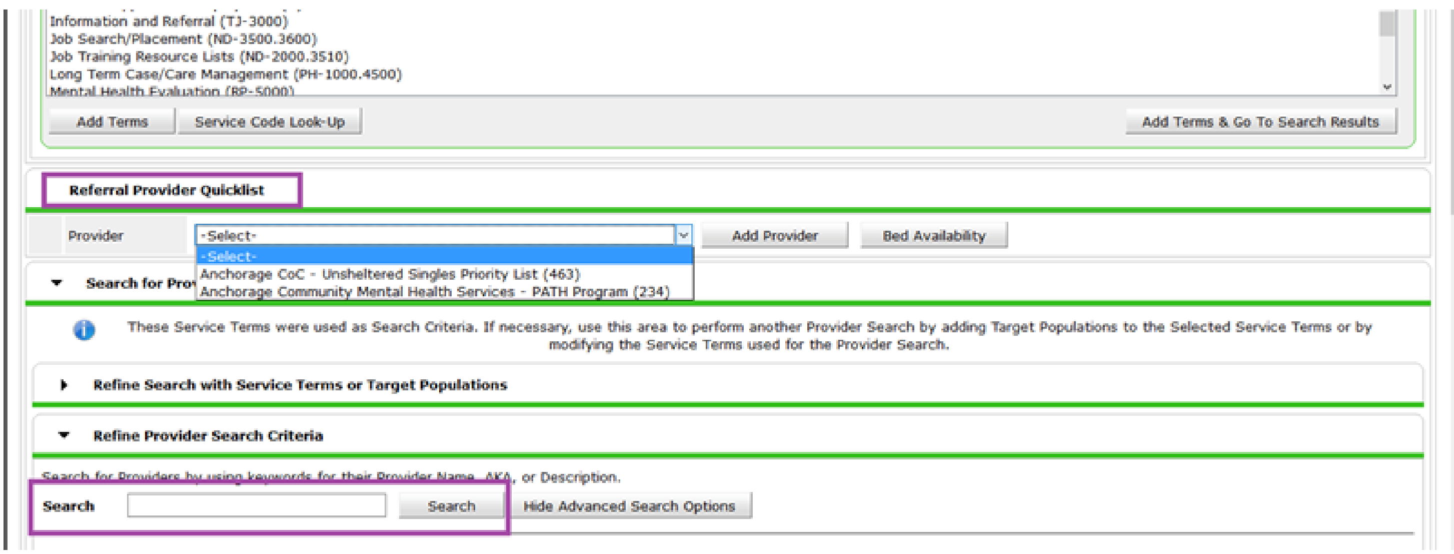
a. Click on the Service Transactions tab. Click Add Referrals.



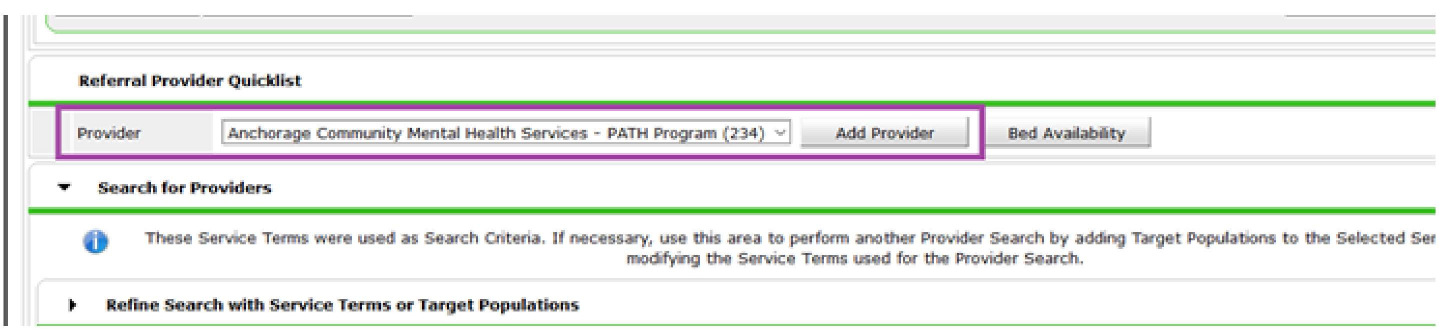
b. Select the Needs for which you are making the referral. To select more than one Need for the referral, hold the Ctrl key while selecting the needs. Click Add Terms.



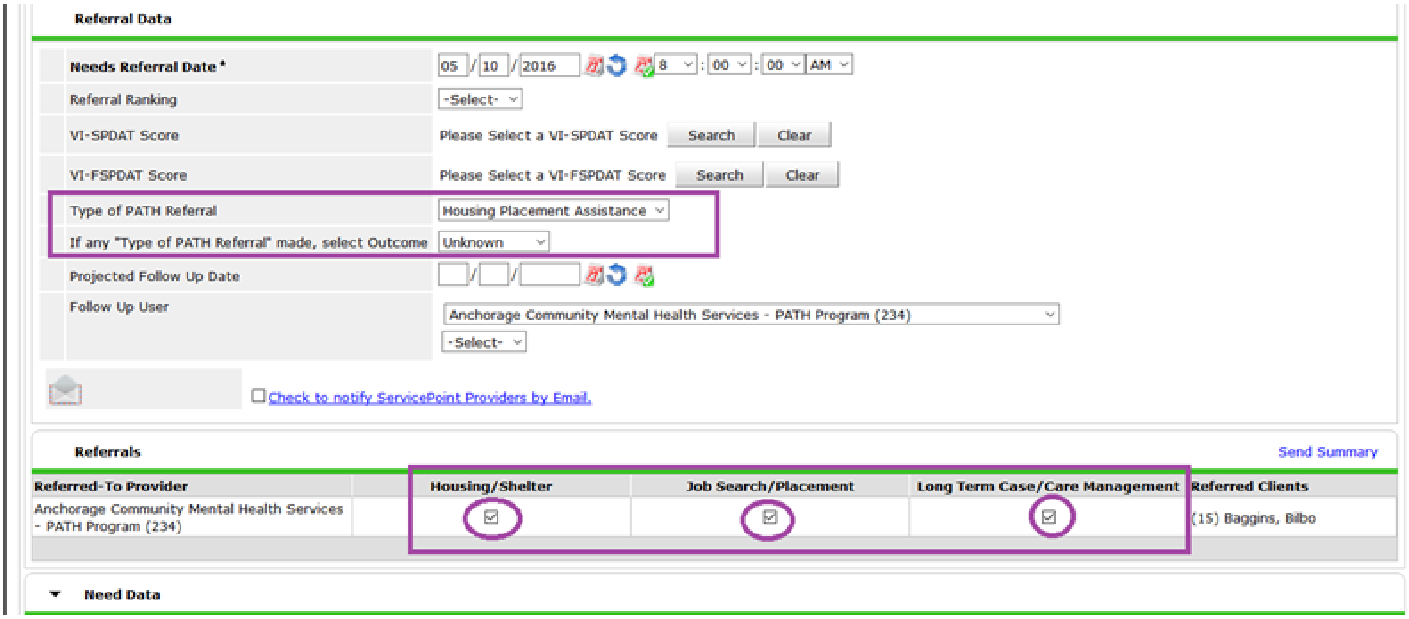
c. Select the Provider you are making the Referral to either from the Quicklist or search for the provider in the Search field.



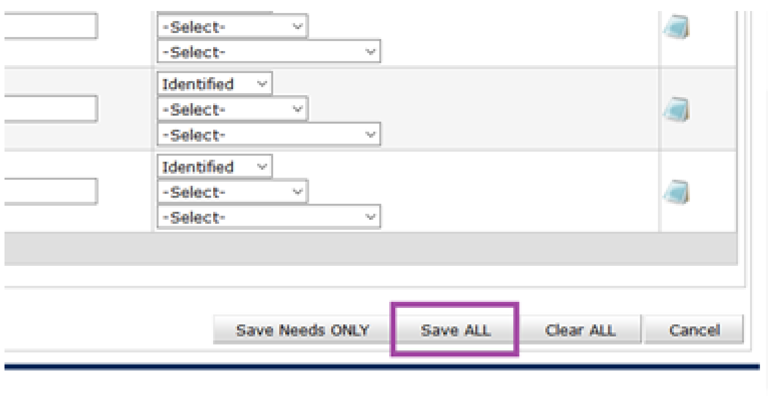
d. If a provider that you are referring to is not in HMIS, make the referral back to your provider. Click Add Provider.



e. Scroll down to Referral Data. Select the Type of PATH Referral and answer “If any Type of PATH Referral made, select Outcome”. Make sure to check all the boxes under each Need in the Referrals section.



f. In the bottom right hand corner, click Save ALL.

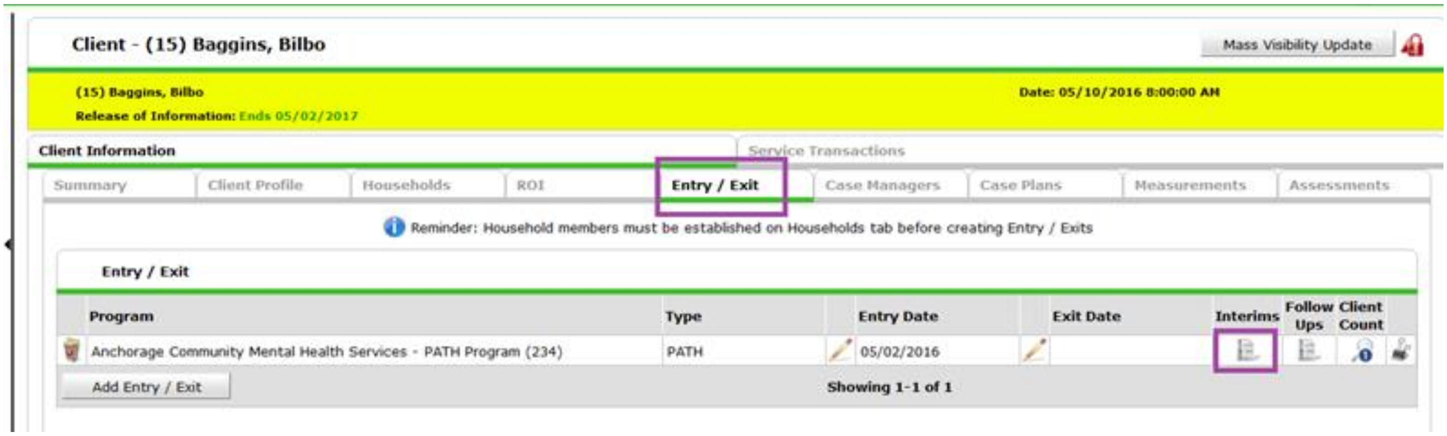


Interim Review (Updates)

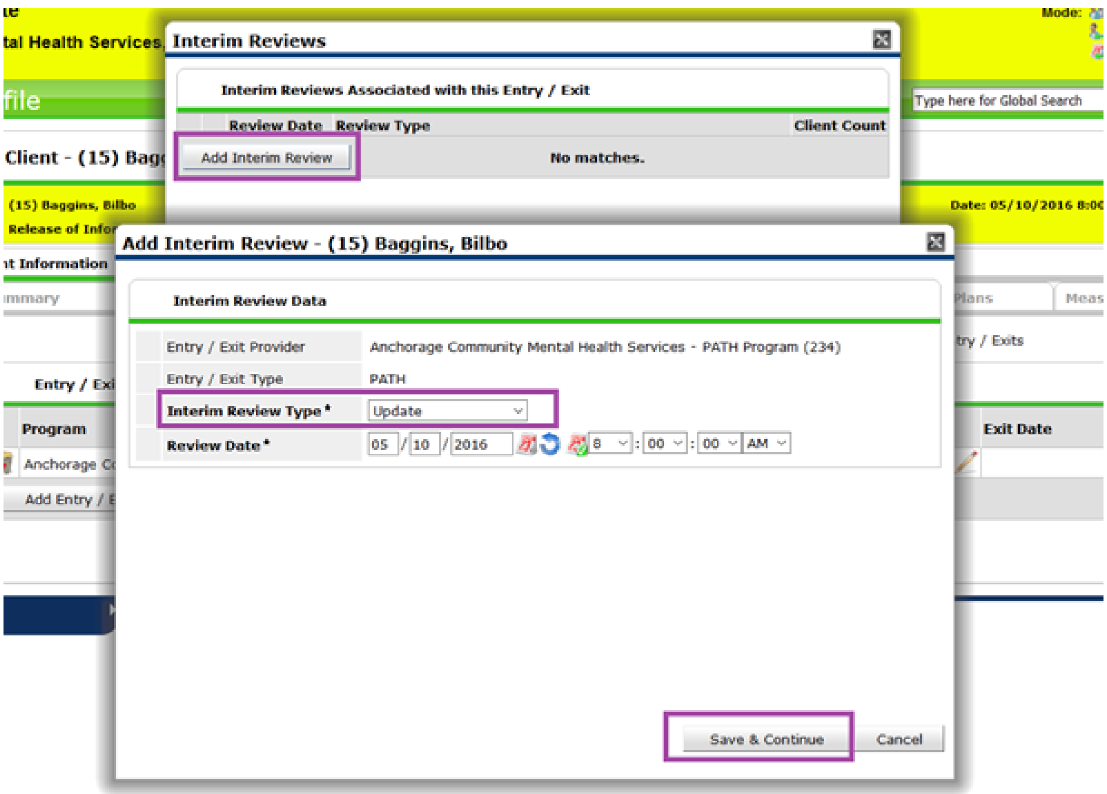
(Change from Project Entry in Health Insurance Coverage, Monthly Income, and / or Non-Cash Benefits)

An Interim Review is created for a client if they have a change in their Health Insurance Coverage, Monthly Income, and / or Non-Cash Benefits that is different from their Project Entry information.

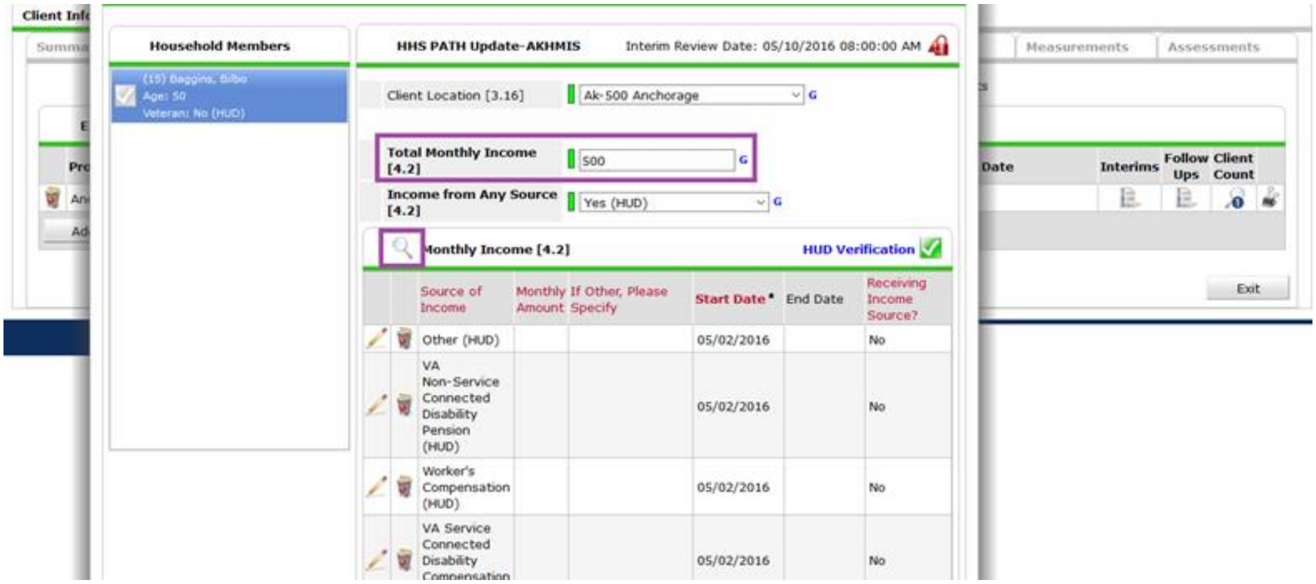
1. **Create an Interim Review**
   a. To do that, navigate to the Entry / Exit tab and click on the icon below Interims.



b. Click Add Interim Review. Interim Review Type* will be an Update, unless it is an Annual Assessment. Click Save & Continue.

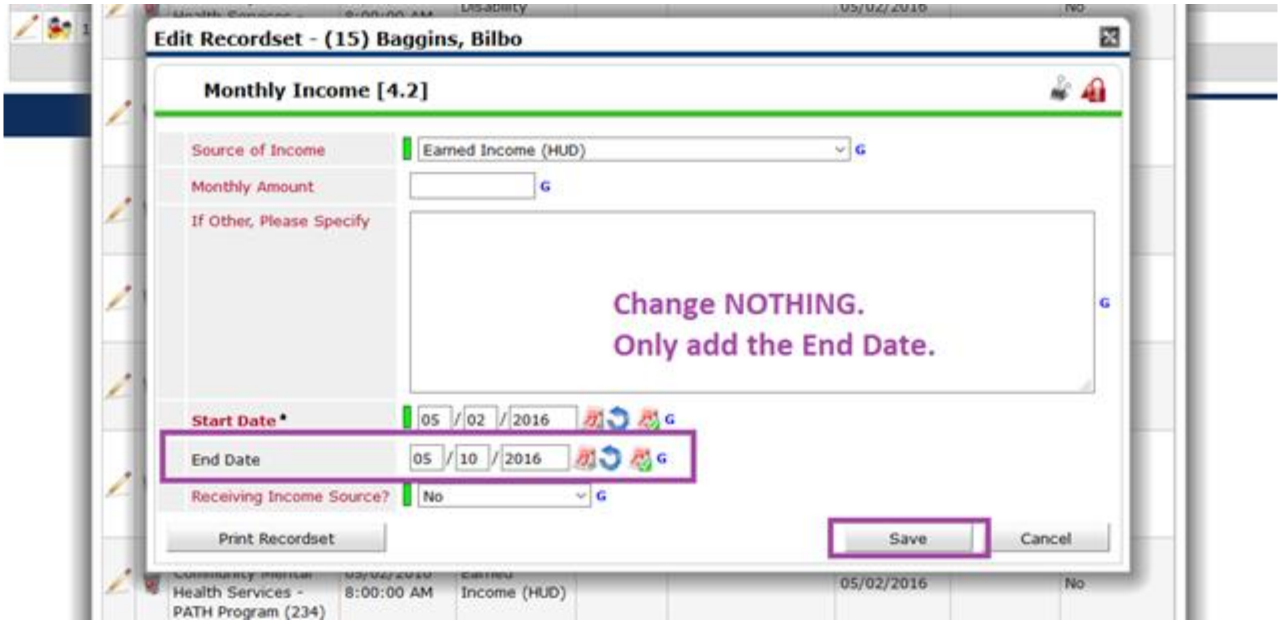


c. Again, if the client had a change in their Income, Non-Cash Benefits, or Health Insurance Coverage from when they entered the project, you would show that in an Interim Review. For example, let's say this client started a part-time job and is making $300 per month, in addition to the $200 he was receiving in Unemployment Insurance at project entry. First, change the Total Monthly Income to $500. Next, click the magnifying glass icon next to Monthly Income.

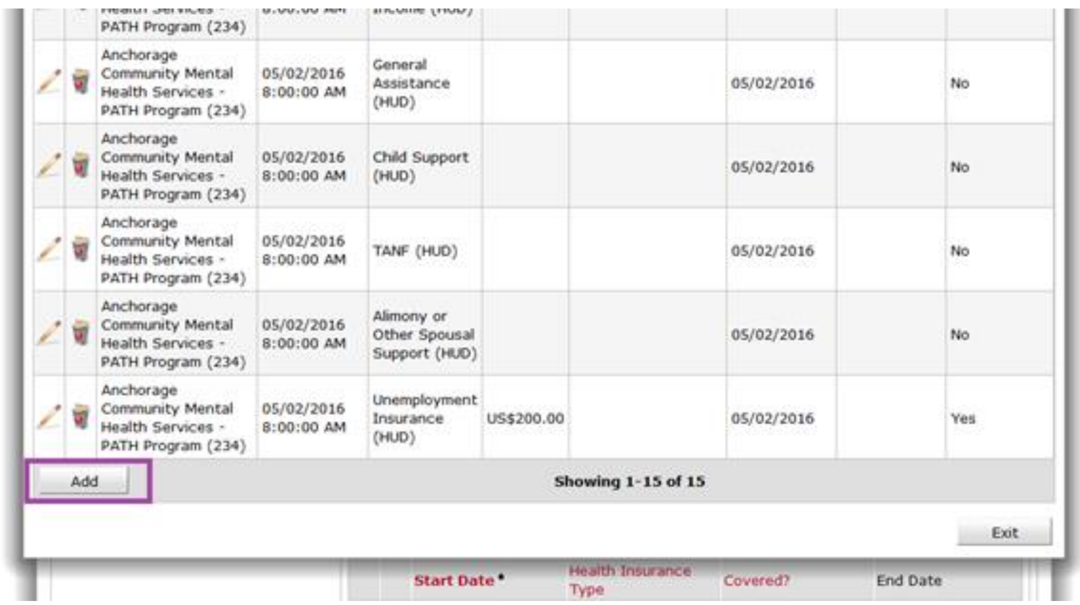


d. Find the Earned Income record that was created when the client initially entered the project. Because the client started a part-time job, this record is no longer true, so it needs to be end-dated or closed. To do that, click on the pencil to the left of the record.

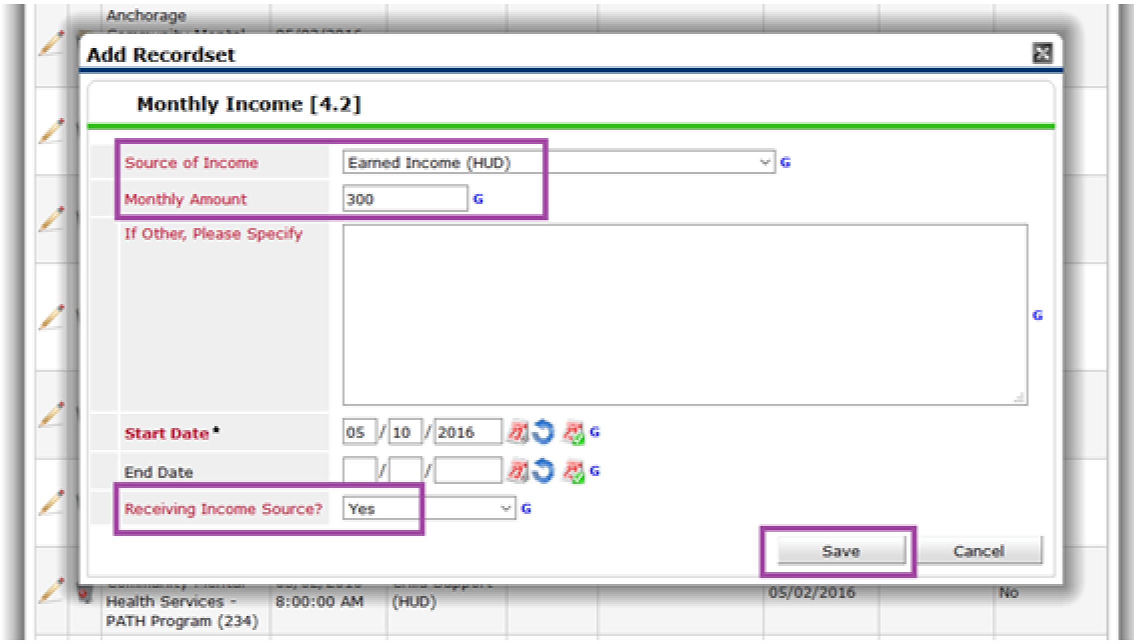
e. Do not change anything to this record. The only thing you are doing is closing it out, so add an End Date, which should be the date of the Interim Review / Update. Click Save.



f. Now, you have to record how much the client is now making in Earned Income. Click Add in the lower left hand corner.



g. Complete the Source of Income, Monthly Amount, and Receiving Income Source fields. Click Save.



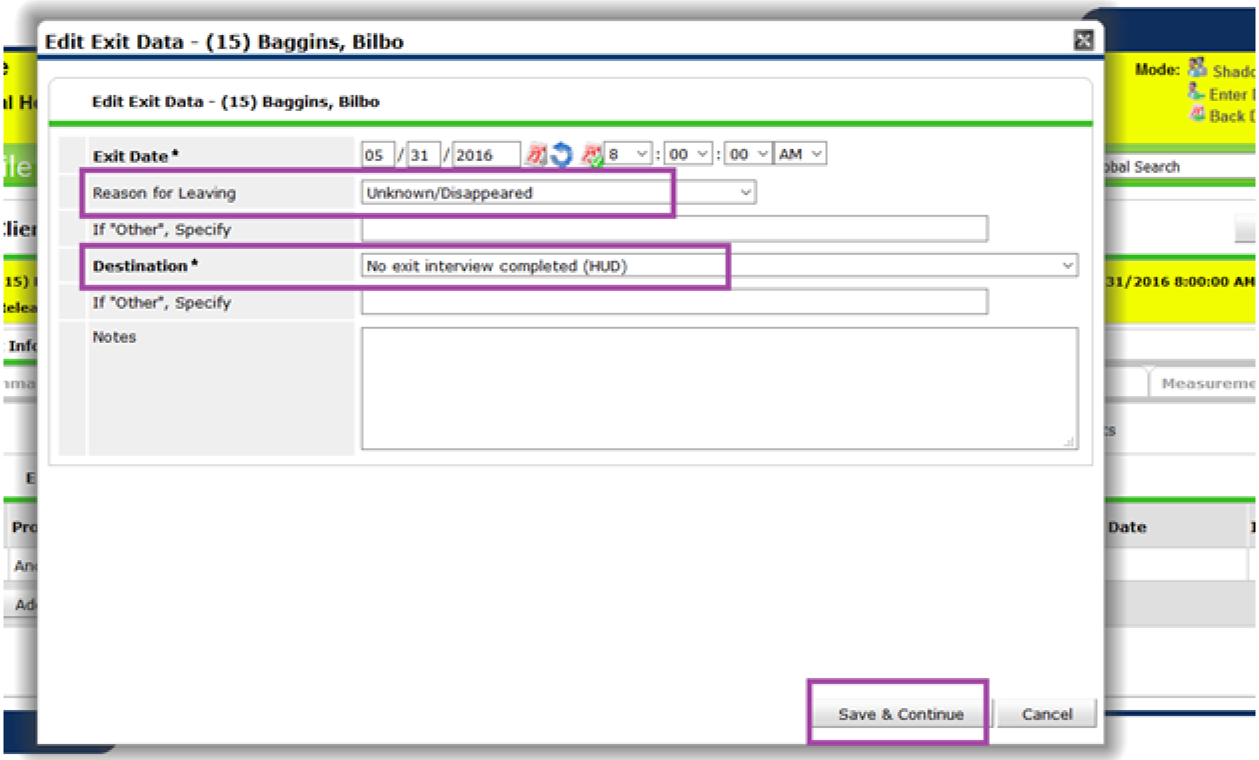
Client Exit from the PATH Project

An Exit is created for the client if the client is not enrolled in the PATH Project, if the client declines further services, or once the client is housed. Clients who are "Contacted" or "Contacted and Engaged", but never have a PATH Status determined (Enrollment) will need an Exit from the PATH Project after 90 days of non-contact.

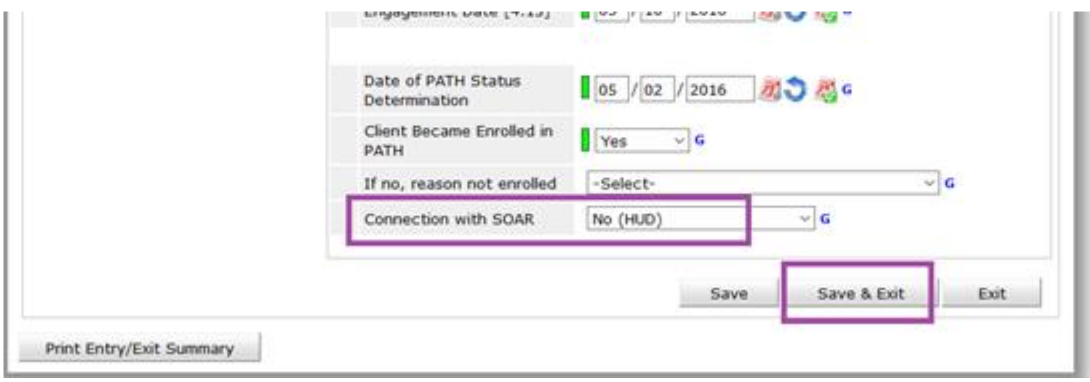
1. Create the Exit Record

a. To exit the client, click on the Entry / Exit tab. Click the pencil icon next to the open Exit Date field.

b. Select a Reason for Leaving and Destination*. Click Save & Continue.



c. The last question on the Exit Assessment asked if the client was connected with SOAR. Answer and then click Save & Exit.



PATH Project Workflow Checklist

- ✓ Create the client record in HMIS, if the client doesn’t already exist in the system.
- ✓ Record Project Entry Date and First Date of Contact with the same dates.
- ✓ Record all known data elements in the Entry Assessment.
- ✓ Record Outreach Service Transaction.
- ✓ Record subsequent Contacts with client in Interim Review.
- ✓ Enter additional data elements in the Entry Assessment as they become available.
- ✓ Record Date of Engagement.
- ✓ Record PATH Status (Enrollment).
- ✓ Record Service Transactions.
- ✓ Record Referrals for services not provided directly by the PATH Project.
- ✓ Record Project Exit Date.

Helpful Tips and Reminders

- As you meet with the client and gather additional client demographic information, include those data elements in the PATH Project Entry Assessment.
- Create Interim Reviews to document Contacts, an Engagement Date, and changes to HUD Verification questions (changes in health insurance coverage, disability information, monthly income, and non-cash benefits) that occur after the first contact / project entry.
- The difference between updating client information on the Entry Assessment and creating an Interim Review:
    - Even if you don’t know all of the client’s demographic data (i.e. name, gender, date of birth, etc.) at the time of the first contact, regardless of when you do learn this information, the client demographic information is true for a client at the time of their PATH Project Entry Date. Therefore, when you get the demographic data from the client, you should enter this information on the Project Entry Assessment.
    - Interim Reviews are created for Contacts and for data that changes after the PATH Project Entry (i.e. the client begins receiving SSI that they weren’t receiving at Project Entry and they have new income). This data was not true or accurate at the time of the PATH Project Entry because the client started receiving the income after the Entry Date into the PATH Project. Therefore, you will need to create an Interim Review to document the date that the change in income occurred.
- Services and Referrals should not be documented as PATH Funded until Enrolled is listed as “Yes,” and Date of PATH Status Determination is answered.