HMIS USER GUIDE FOR HHS PATH SO & SSO PROJECTS

Street Outreach (SO) | Supportive Services Only (SSO)

Contents

Date of Last Revision: 8/17/2022

DATA ENTRY QUICK REFERENCE

This section provides simplified instructions for common data entry tasks. Please refer to the General HMIS Instructions and upcoming sections of this document for further instruction. Your agency may have a project that receives funding from multiple sources for the same project to serve the same clients.

If you are using a single HMIS provider to report out to multiple funders, you will need to complete the data entry and reporting requirements for *each funder.* For detailed instructions, please refer to the Using one provider for multiple funding sources article found on MN's HMIS Knowledge Base.

Create a New Client Record

1. Click on **Enter Data As** (EDA) and select the correct provider to enter EDA mode.
    a. For clients who generally reside in the streets or places not meant for human habitation, enter them into your Street Outreach (SO) Provider
    b. For clients who generally reside in a place meant for human habitation, including emergency shelters, enter them into your Supportive Services (SSO) provider.
    c. If you were unable to learn where the client generally resides, enter them into your Supportive Services (SSO) provider. If you later learn the client generally resides in the streets or places meant for human habitation, you do not need to change the client's program entry.
2. Make sure that the client is not already in HMIS by searching for 3 different variations of their name using the **Name** fields.
3. If no records match, fill out all of the search prompts and click on **Add New Client With This Information**. Clients that have consented to statewide data sharing should have the word **SHARED** typed in the **Alias** field.
4. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, you can select **Current System Date**.
    a. The date can be changed by clicking on **Back Date** in the top-right corner of the screen.
5. Select the **Client Profile** tab and enter any information missing from the **Universal Profile Assessment**.
    a. If a client has agreed to statewide data sharing, enter a **Date of ROI Consent**.
6. If the client is being served with other household members, click on the **Households** tab and either add them to an existing household or create a new household. This is uncommon in PATH projects.

ENTER A CLIENT INTO A PROJECT

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.
    a. For clients who generally reside in the streets or places not meant for human habitation, enter them into your Street Outreach (SO) Provider.
    b. For clients who generally reside in a place meant for human habitation, including emergency shelters, enter them into your Supportive Services (SSO) provider.
    c. If you were unable to learn where the client generally resides, enter them into your Supportive Services (SSO) provider. If you later learn the client generally resides in the streets or places meant for human habitation, you do not need to change the client's program entry.
2. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, you can select **Current System Date**.
    a. The date can be changed by clicking on **Back Date** in the top-right corner of the screen.
3. Click on the **Entry / Exit** tab and select **Add Entry / Exit**.
    a. If entering a household, check the box next to each client included in the entry.
    b. Select **PATH** from the **Type** drop-down menu.
    c. If necessary, adjust the **Project Start Date**, then select **Save & Continue**.
4. For each client included in the entry, complete the data elements on the **HHS: PATH Entry Assessment** in the **Entry/Exit Data** pop-up.
    a. If entering data for multiple household members, save time by clicking on **Add Household Data** and completing the **Household Data Sharing Assessment**.
    b. Add the **Current Living Situation** (same date as Project Start Date) and fill in its pop-up sub-assessment.
    c. If the client was **Engaged**, **Enrolled** or **Connected to Project SOAR at the time of their project entry,** record these in the PATH Sub-Assessment.

ADDING PATH-FUNDED SERVICES

SERVICES are entered for clients Enrolled in the PATH project. Users only need to record a PATH Service the first time that service is given to a client. It is not necessary to record multiple instances of the same PATH Service during a client's project stay, even if the client receives the Service more than once.

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.
2. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, you can select **Current System Date**.
    a. The date can be changed by clicking on **Back Date** in the top-right corner of the screen.
3. In the **Service Transactions** tab, select **Add Multiple Services.**
4. Using the Service date as both the Start & End Dates, choose the **Service Type.**
5. Using the PATH Services Crosswalk provided below, choose the **Type of PATH Funded Service Provided**, then select **Save & Exit.**

MAKING PATH REFERRALS

REFERRALS are entered for clients Enrolled in the PATH project. Users only need to record a PATH Referral the first time that referral is made for a client. It is not necessary to record multiple instances of the same PATH Referral during a client's project stay, even if the client receives the Referral more than once.

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.
2. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, you can select **Current System Date**.
    a. The date can be changed by clicking on **Back Date** in the top-right corner of the screen.
3. In the **Service Transactions** tab and **Referrals** sub-tab, click **Add Referral.**
4. Using PATH Referrals Crosswalk provided below, select the **Need** that is prompting referral under **Service Code Quicklist**.
5. Click **Add Terms**. The selected needs will appear at the bottom under **Selected Needs**.
6. Under **Referral Provider Quicklist**, select **PATH Referral Provider** from dropdown, then click **Add Provider.**
7. Using PATH Referrals Crosswalk below, select the **Type of PATH Referral.**
8. Click on the box under Referrals to confirm the referral. Date of Need should match Needs Referral Date.
9. Select **Save All** at the bottom of the screen.

UPDATING PATH REFERRALS: OUTCOMES	Update REFERRAL records during project enrollment. All referrals must have an Outcome recorded on or before the Exit Date. 1. Confirm you are in EDA mode to the correct provider and backdate to the date for the Outcome of the Referral. 2. In the **Service Transactions** tab and **Referrals** sub-tab, select the edit **pencil** next to Referral you want to update. 3. Select the **Outcome** from drop-down menu next to, **If Any Type of PATH Referral Made, Select Outcome.** 4. Select the **Outcome** from drop-down menu next to Referral Outcome. 5. Select **Save & Exit.**
UPDATE A CLIENT'S INFORMATION	Create Updates when data elements for the client change, to record continuing Current Living Situation (contacts) after Project Start Date (multiple *PREVIOUS* dates of contact may be added at each Interim Update), or when an Annual Assessment is due each year after the Project Start Date. 1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**. 2. Click on the **Entry/Exit** tab, then select the **Interims** icon for the correct Entry/Exit. 3. In the **Interim Reviews** pop-up, click on **Add Interim Review**. a. Select **Update** or **Annual Assessment** from the **Interim Review Type** drop-down menu. b. If serving a household, be sure to include all applicable household members in the entry by checking the boxes next to their names. 4. Add a **Current Living Situation** for any contacts that have taken place since the last Project Start Date or Interim. 5. Review the following data elements for each household member in the **Entry/Exit Interim Review HHS: PATH Update Assessment** pop-up; where a change has taken place, update with the correct answer: a. <u>All clients</u>: Health Insurance Y/N data element, Health Insurance & Disabilities Sub-Assessments. b. <u>Head of Household Client and adults (18+)</u>: All of the above, as well as Monthly Income and Non-Cash Benefits and their Y/N data elements; Current Living Situation, PATH Status, Connection with Project SOAR (and their individual sub-assessments). c. <u>Head of Household</u>: All of the above as well as Client Location.

EXIT A CLIENT FROM A PROJECT	1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**. 2. Click on the **Entry/Exit** tab, then select the **edit pencil** (in the **Exit Date** column) next to the correct entry. a. If exiting a household, be sure to include all applicable household members in the exit by checking the boxes next to their names. b. Enter the correct **Exit Date** and **Destination**, then click on **Save & Continue.** 3. Complete the **HHS: PATH Exit Assessment** for each household member. a. All clients: Health Insurance Y/N data element, Health Insurance & Disabilities Sub-Assessments. b. Head of Household Client and adults (18+): All of the above, as well as Monthly Income and Non-Cash Benefits and their Y/N data elements; Current Living Situation, PATH Status (if not Enrolled), Connection with Project SOAR (and their individual sub-assessments).
RUN A REPORT	For more information about PATH Reports, refer to the user guide section titled Reporting Guidelines. 1. Click on **Reports** to open the **Report Dashboard**. Select **PATH.** 2. Fill out the prompts in the **Report Options** section, then click on **Build Report**. 3. Review sections to identify data quality issues.

NOTE ON DATA SHARING

PATH workers are more likely than those in other projects to be unable to present a HMIS Release of Information at the first contact with a client. Read these instructions to understand your obligations when entering data on a client not yet in the HMIS.

After first contact with a client, when entering them into your project in HMIS, follow these steps if you searched for the client and did not find a matching record:

1. If the client did not sign an ROI at the time of the first contact, you may still create the client record, but the record should be closed. See this document (starting p.7) for instructions on closing a client record.
    a. If the client did not sign an ROI consenting to sharing, do not add **SHARED** in the Alias field.
2. If the client does not sign an ROI consenting to sharing at any point while being served by PATH, no further action is needed.
3. If the client does eventually sign an ROI consenting to sharing while being served by PATH, create a new, shared record for the client. Project Start Date, Date of Engagement, and date of first Current Living Situation should match the date the ROI was signed (more information on these data elements follows in this guide).

DATA COLLECTION FORMS

Data collection forms for HHS PATH projects can be found by visiting the Forms and Instructions page on the Minnesota HMIS website. These forms will change as new data standards are released biannually on October 1. There are both PDF and Word versions available for download.

You are not required to use ICA's data collection forms. Staff responsible for data collection should also be aware that their agency may require them to gather non-HMIS data that is not captured by these forms.

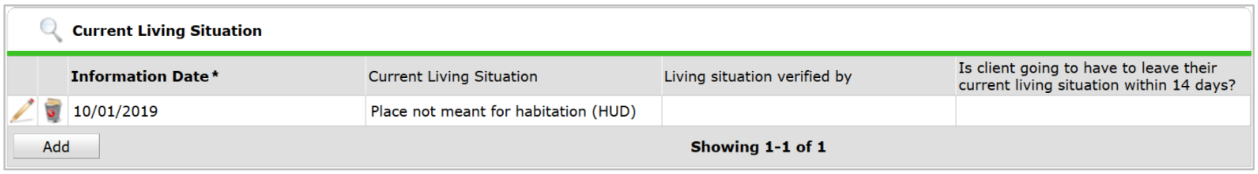
INDIVIDUALS & HOUSEHOLDS

The same data collection forms are used for both singles and households, as most MN-PATH clients are served as singles. Please use additional forms to capture the required information for other members of a household that your PATH project serves.

PROGRAM-SPECIFIC DATA ELEMENTS

Program-Specific Data Elements are chosen by your funder and are often unique to the types of projects they fund. More information about these data elements can be found in the PATH HMIS Manual.

4.12 CURRENT LIVING SITUATION



Project Type Applicability: Street Outreach & Supportive Services Only

Data Collected About: Head of Household and Adults

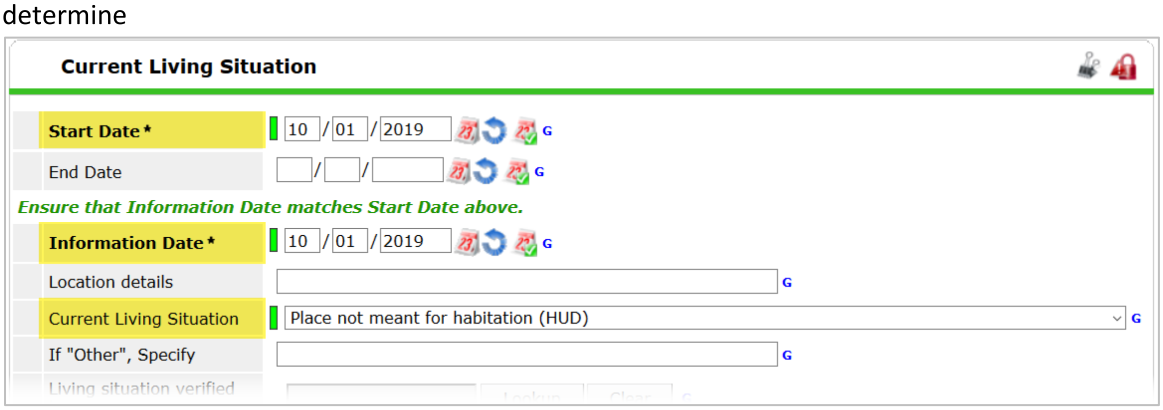
Data Collection Point: Occurrence Point (At the Time of Contact)

Rationale: To record each contact with people experiencing homelessness by street outreach and other service projects and to provide information on the number of contacts required to engage the client, as well as to document a current living situation as needed in any applicable project.

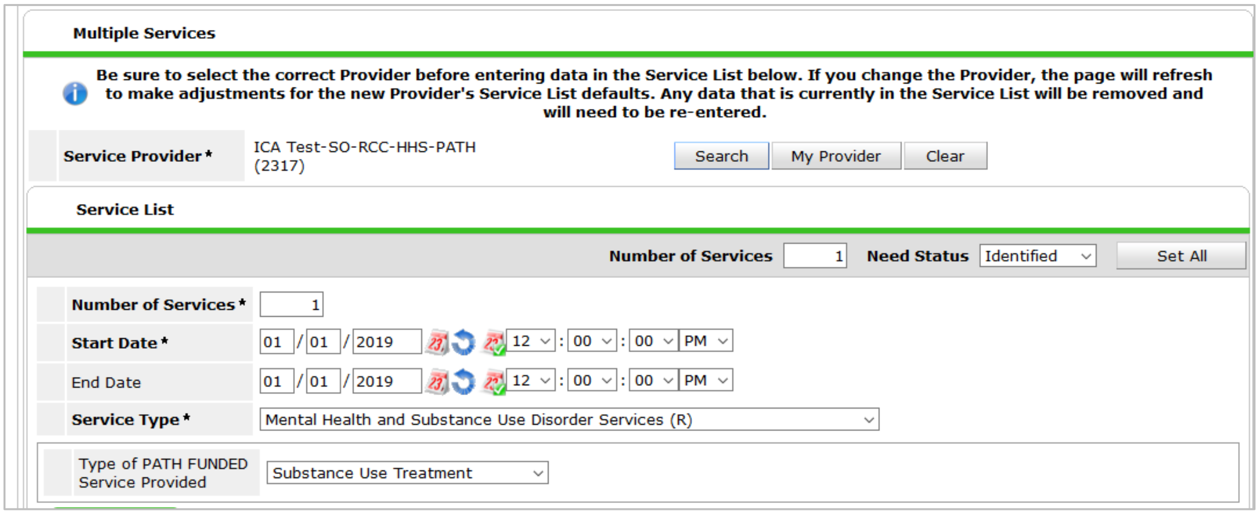
Data Collection Instructions: Record the date and Current Living Situation of each interaction with a client. The first Current Living Situation will occur at the same point as Project Start Date. A Current Living Situation must be recorded anytime a client is met, including when a Date of Engagement or Project Start Date is recorded on the same day. There may or may not be a contact made at project exit.

The data element Current Living Situation has several dependent questions, but PATH providers are required only to record the following:

- **Information Date:** This is the date the interaction took place. In ServicePoint, you will record a **Start Date** that matches the **Information Date**.
- **Current Living Situation**: PATH providers should only select one of the following options: Place not meant for habitation (e.g. a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside); 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



P1 PATH-FUNDED SERVICES



Project Type Applicability: Street Outreach & Supportive Services Only

Data Collected About: Head of Household **Data Collection Point:** From Date of Enrollment to Project Exit

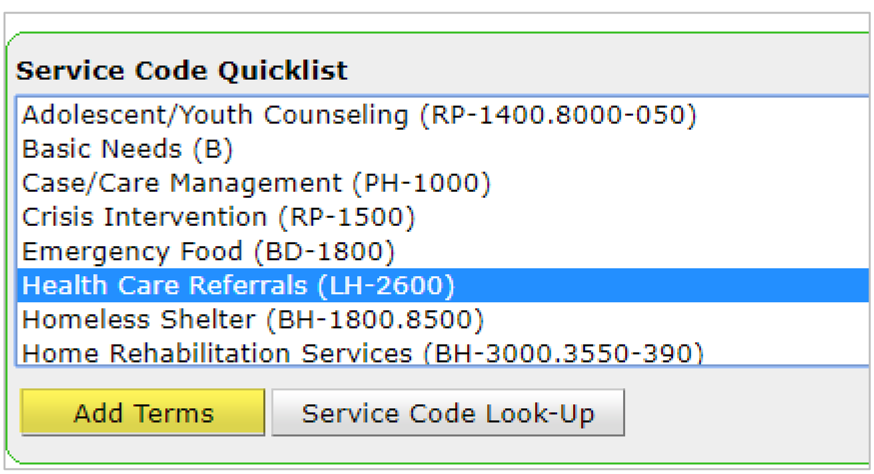
Rationale: To determine the PATH-funded Services that are provided to a client during project Enrollment, following project Enrollment and prior to Project Exit.

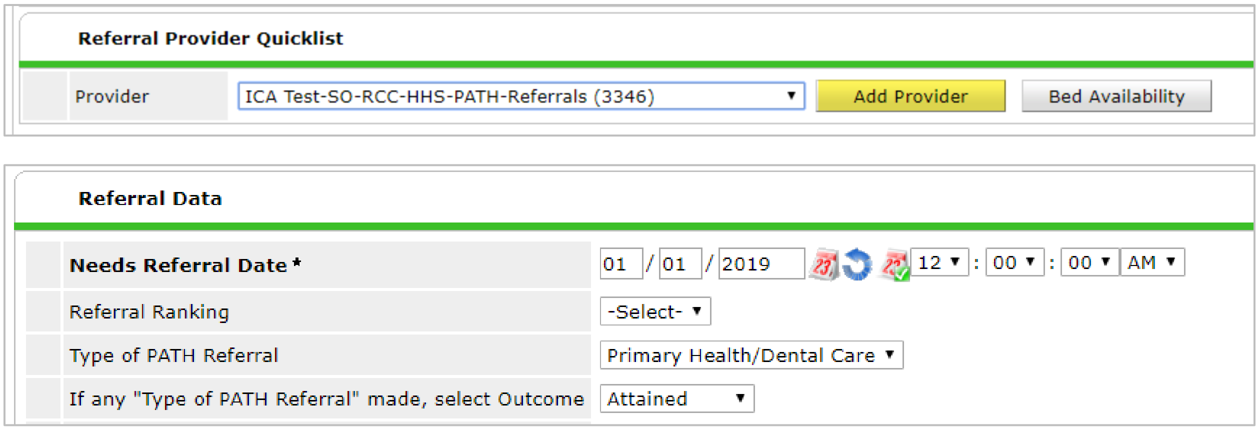
Data Collection Instructions: Record PATH-funded Services provided to the client by your agency. Services should be recorded for only PATH-enrolled clients.

The Annual PATH Report only requires grantees to collect one instance of each type of PATH Service provided per client; however, PATH providers may choose to collect multiple instances of each service.

The language used in ServicePoint to describe services is not the same as the language used by PATH to describe services. Refer to the PATH Services Crosswalk on page 10 of this document for information on how to complete the Service Type and Type of PATH FUNDED Service Provided fields above.

P2 PATH REFERRALS





Project Type Applicability: Street Outreach & Supportive Services Only

Data Collected About: Head of Household

Data Collection Point: From Date of Enrollment to Project Exit

Rationale: Determine the PATH-funded Services that are provided to a client during project Enrollment, following project Enrollment and prior to Project Exit. A Referral has been attained once the PATH-Enrolled client begins receiving services as the result of PATH assistance.

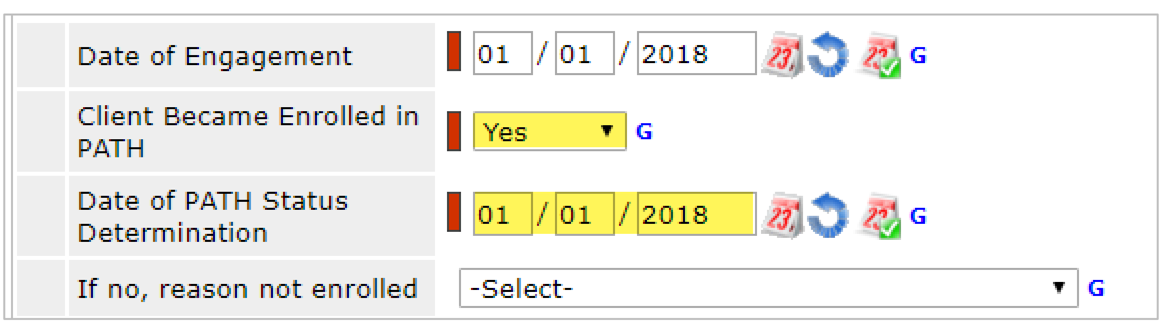
Data Collection Instructions: Record PATH-funded Referrals provided to the client by your agency.

The PATH Annual Report only requires grantees to collect one instance of each type of PATH Referral provided per client; however, PATH providers are encouraged, but not required, to record each instance of PATH-funded Referrals provided to PATH-enrolled clients.

Each PATH Referral should have an **Outcome** of **Attained**, **Not Attained,** or **Unknown** entered by the time the client exits the program. It is a good practice to record the outcome as soon as it is known, or before the end of a report period.

The language used in ServicePoint to describe referral types is not the same as the language used by PATH to describe referral types. Refer to the PATH Referrals Crosswalk on page 11 of this document for information on how to complete the Service Code and Type of PATH Referral fields above.

P3 PATH STATUS



Project Type Applicability: Street Outreach & Supportive Services Only

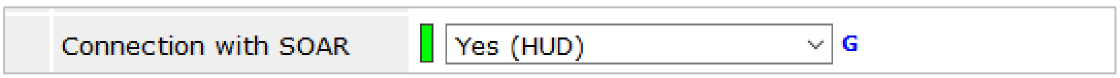
Data Collected About: Head of Household

Data Collection Point: Once at Project Start Date or Interim if enrolled. At Exit if not enrolled.

Rationale: A PATH enrollment occurs at the point when a client has formally consented to participate in services provided by the PATH project. PATH projects must report on the number of clients enrolled during each operating year.

Data Collection Instructions: The Date of PATH Status Determination should be entered at the point where you can determine whether the client is eligible for PATH. It may be on or after the Project Start Date or Engagement Date but must be prior to Project Exit. If engagement and eligibility determination take place after the client's project start/first contact, then Date of Engagement, PATH Status, and Date of PATH Status Determination should be recorded in an Interim Update, not in the project entry record. If the client exits without becoming enrolled, the PATH Status element should be recorded in the project exit record, indicating that the client was not enrolled and the reason the client was not enrolled.

P4 CONNECTION WITH SOAR



Project Type Applicability: Street Outreach & Supportive Services Only

Data Collected About: Head of Household

Data Collection Point: Date of Engagement, Date of Enrollment, and Project Exit

Rationale: To identify persons who are connected to the SOAR (SSI/SSDI Outreach, Access, and Recovery) program.

Data Collection Instructions: The Connection with SOAR question should be answered by the Date of Engagement, then asked again at the Date of Enrollment and Project Exit.

PATH SERVICES CROSSWALK PROVIDED BY HMIS VENDOR

P1 PATH-Funded Services Provided

Services recorded only for Heads of Households and adults; record Service for Head of Household when that Service benefits the whole household. Record once, the first time the Service is provided.

Type of PATH Funded Service	Service Term in HMIS	Code in HMIS
Re-Engagement	Street outreach programs	PH-8000
	Outreach programs	TJ-6500.6300
Screening	Mental Health Screening	RP-5000.5000
Clinical Assessment	Mental Health Evaluation	RP-5000 & associated
Habilitation/Rehabilitation	Rehabilitation/habilitation services	LR and related
Community Mental Health	Mental health support services	RR and related
	Mental health drop in centers	RM and related
Substance Use Treatment	Substance abuse services	RX and related
	Mental health and substance abuse services	R and related
Case Management	Case/care management	PH-1000
	Representative payee services	DM-7000
	Social security disability insurance appeals/complaints	NS-1800.8000-800
	Social security disability insurance applications	NS-1800.8000-820
	Supportive housing placement and referral	BH-8500 and related
	Benefits assistance	FT-1000 and related
	Housing counseling	BH-3700
	Housing search and information	BH-3900 and related
	Personal financial counseling	DM-6000
Residential Supportive Services	Life skills education	PH-6200.4600
Housing Minor Renovation	Home improvement/accessibility	BH-3000 and related
Housing Moving Assistance	Moving assistance	BH-5000 and related
	Rental application fee payment assistance	BH-3800-7200
	Housing expense assistance	BH-3800
	Material goods	BM and related
Housing Eligibility Determination	Housing Search and Information	BH-3900
Security Deposits	Rental deposit assistance	BH-3800-7250
One-time Rent for Eviction Prevention	Rent payment assistance	BH-3800.7000

PATH REFERRALS CROSSWALK PROVIDED BY HMIS VENDOR

P2 PATH Referrals

The PATH Referrals data element is required for both PATH Street Outreach and PATH Services Only projects. Each Referral entered needs to have an **Outcome** (Attained, Not Attained, or Unknown) recorded by the date of Project Exit.

Type of PATH Referral	Term in HMIS	Code in HMIS
Community Mental Health	Mental health support services	RR and related
	Mental health drop in centers	RM and related
Substance Use Treatment	Mental health and substance abuse services	R and related
	Substance use disorder services	RX and related
Primary Health/Dental Care	Health care	L and related
	Health support services	LH and related
Job Training	Job training formats	ND-2000.3500 and related
Educational Services	Education	H and related
	Educational programs	HH and related
Housing Services	Housing Search and Information	BH-3900
Permanent Housing	Supportive Housing Placement/Referral	BH-8500
Income Assistance	Basic income maintenance	NL-1000
	At Risk/Homeless Housing Related Assistance Program	BH-0500
Employment Assistance	Employment	ND
Medical Insurance	Health Insurance/Dental Coverage	LH-3000
Temporary Housing	Transitional Housing/Shelter	BH-8600

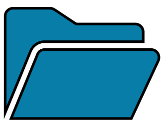
REPORTING GUIDELINES

This section introduces the data quality and funder-required reports for **PATH** projects. For information about reporting periods, due dates, and changes to requirements, refer to communications from funders.

DATA QUALITY REPORTS

Name: FED-12-DQR-228 – PATH Data Completeness

Location in BusinessObjects:



Public Folders

minnesota_live_folder

SSA Report Gallery (Funder Reports) (Secure)

3. Federal Homeless Programs

HHS PATH

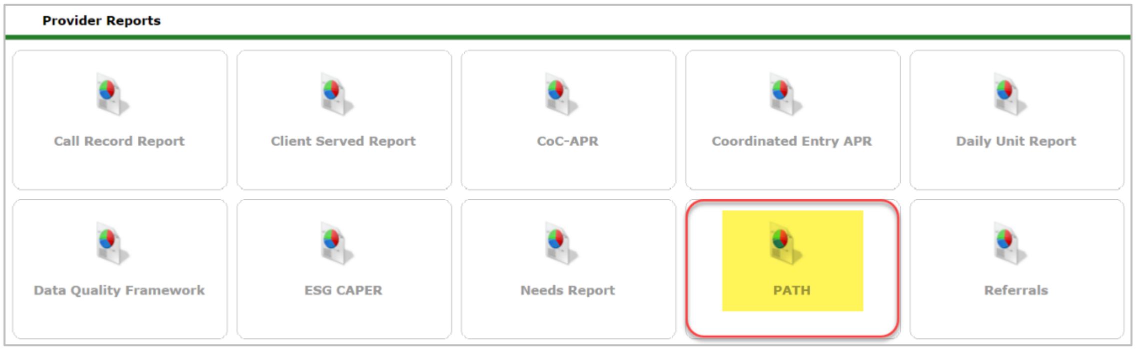
Required Prompts:

- Select Provider(s): *Choose the provider(s) you want to include in the report* ***OR*** *select your PATH Reporting Group*
- Select Reporting Group(s): *Search for and select your agency's PATH Reporting Group*
- EDA Provider: *Leave blank except in rare cases (for example if ICA told you to use it)*
- Enter Start Date: *First day of reporting period*
- Enter End Date (PLUS 1 Day): *Last day of reporting period + 1*
- Enter Effective Date: *Same as end date*

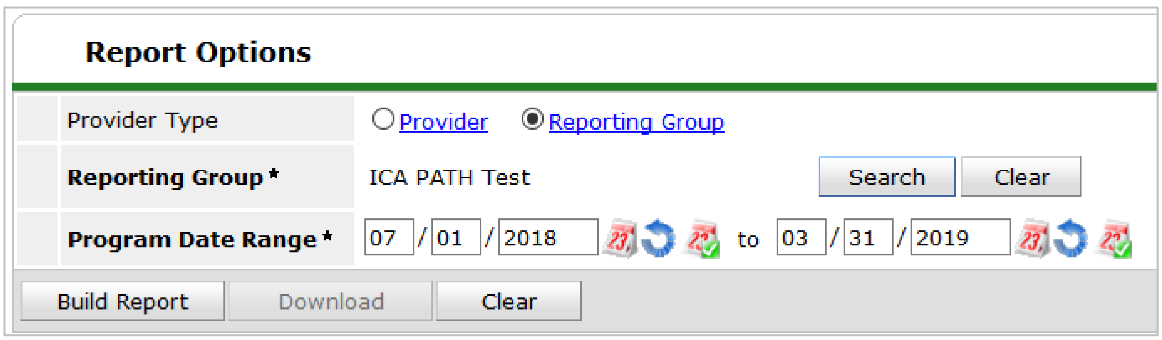
Data Quality Instructions: Users should run data quality reports regularly to ensure that accurate information is being recorded and to address any data errors indicated. We recommend you run this report as an Excel file, as it is not formatted for printing as a PDF and Excel files are generally easier to navigate. This report contains client identifying information and should never be sent to your funder.

FUNDER-REQUIRED REPORTS

Name: PATH **Location:** Reports Dashboard



Required Prompts: Provider Type, Reporting Group, Program Date Range



Submission Frequency: Quarterly (cumulative) and Annually

1. Click the Reports tab on the left side of the main screen (not in **BusinessObjects**).
2. Select **PATH.**
3. In the Provider Type field, choose **Reporting Group**. Search for and enter your agency's PATH Reporting Group into the Reporting Group prompt.
4. Enter the exact start and end dates of the reporting period.
5. Click **Build Report.**
6. Click on the numbers in the tables to see which clients are being pulled into data fields. Click on the numbers in the tables that say, "Data Not Collected" or "Missing" to see what needs to be corrected.
7. Highlight and/or download from the tables as needed.
8. After all corrections have been made, follow the instructions provided by the MN State PATH contact for submission to the PATH Data Exchange (PDX).

Submission Instructions: Data generated by the PATH report should be entered into the PATH Data Exchange (PDX). For questions or assistance with PDX, or the report submission process in general, contact the MN State PATH liaison.