MN HMIS Data Entry Directions for PATH

Updated October 2, 2017

**For clients who generally reside in the streets or places not meant for human habitation, enter them into your Street Outreach (SO) provider; for clients who generally reside in a place meant for human habitation, including emergency shelters, enter them into your Supportive Services (SSO) provider.*

Client Record

1. Click on "Enter Data As" (EDA) and select the correct provider to enter EDA mode.
2. In Client Point, fill out 3 different combinations in the NAME (first, middle, last) data field for primary client to search for an existing record. Select primary client's name in the search results or confirm no records match.
3. If no records match, complete the rest of the prompts as fully as possible. If client has signed the ROI to be included in Statewide Data Sharing, type SHARED in the Alias field.
4. Click "Add New Client With This Information."
5. Backdate to client's entry date (in pop-up or by clicking on "Back Date").
6. Click on the pencil to complete the Demographics as completely as possible under the Client Profile tab.
7. Create a household in the Household tab ONLY if primary client is being served with other household members. ***Most MN PATH clients in MN are served as single. If you are serving a household, a separate form can be filled out for each participating household member.***

Entry

***An ENTRY is created at the Date of First Contact for PATH clients, and all information that was true as of that date, regardless of when it is collected, is input here.**

1. Confirm that you are in EDA mode to the correct provider and open to the primary client's record.
2. Confirm that you are backdated to the date of client's entry
3. Click "Entry/Exit" and "Add Entry/Exit", then select "PATH" for data type (If entering a household, first click on "Add Household Data" to complete the *Household Data Sharing Assessment* and answer data elements common among all clients prior to completing each individual entry assessment.)
4. Add a Date of Outreach Contact and fill in pop-up sub-assessment
5. Record if and when the client becomes Engaged and then Enrolled; each should have only 1 date, which may or may not be the same
6. Fill in the other answer fields throughout the Entry Assessment, including the ROI for those who signed.
7. Save

Interim Updates

***An INTERIM Update is created to record data elements for the client that have changed since Entry or the last Interim Update, and to update the PATH status of Engagement and Enrollment if these did not occur at Entry/First Contact.** (However, data obtained for the Client Record- Name, SSN, Veteran Status- should instead be entered by clicking on the pencil next to the Client Record under the Client Profile tab. Likewise, any data that was true as of Entry/First Contact should be recorded by going back and reopening the existing Entry transaction, regardless of when that data was collected.)

***Also use Interim Updates to record additional contacts with the client for every contact after First Contact.** This should continue for the entire time the client is involved with PATH until Exit, and multiple contacts may be recorded on the same Interim Update.

1. Confirm that you are in EDA mode to the correct provider and open to the primary client's record
2. Click "Entry/Exit" + "Interims" + "Add Interim Review", then "Update" for review type, and enter date of review.
3. Add a Date of Outreach Contact and fill in pop-up sub-assessment (you may add multiple PREVIOUS dates of contact)
4. Fill in other answer fields with as much data as was given by client at this date of contact, including PATH Status, if it has changed
5. Save

See PATH Reference Guide for information regarding definition. All Universal Data Elements and Provider Specific Data Elements are required to be collected by the Date of Engagement for Street Outreach

Services

***SERVICES are entered for clients <u>Enrolled</u> in the PATH project (only 1 Service TYPE is required to be collected per client, though projects may choose to collect multiple services of the same type)**

1. Confirm that you are in EDA mode to the correct provider and backdate to the date of the Service
2. In the Service Transactions tab, click “Add Service”, using the Service date as both the Start & End Dates
3. Using PATH Services Crosswalk (page 3 of this document), choose the Service, then click “Save & Continue”
4. On next screen, use PATH Services Crosswalk to choose PATH Service Type, then “Save & Exit”

Making Referrals

***REFERRALS may be entered at any time, but any service or referral provided to a client prior to enrollment, or post enrollment that are not PATH-funded, must be excluded from the PATH Annual Report (only 1 Referral TYPE is required to be collected per client, though projects may choose to collect multiple services of the same type)**

1. Confirm that you are in EDA mode to the correct provider and backdate to the date of the Referral
2. In the Service Transactions tab and Referrals sub-tab, click “Add Referral”
3. Using PATH Referrals Crosswalk (p.4), select Need that is prompting referral under Service Code Quicklist
4. Click “Add Terms.” The selected needs will appear at the bottom under Selected Needs
5. Under Referral Provider Quicklist, select PATH Referral Provider from dropdown, then click “Add Provider”
6. Using PATH Referrals Crosswalk, select the Type of PATH Referral
7. Click on the box under Referrals to confirm the referral (Date of Need should match Needs Referral Date)
8. Click on “**Save All”** at the bottom of the screen

Updating Referrals

***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, click on pencil next to Referral you want to update
3. Select the outcome from drop-down menu next to “If Any Type of Referral Made, Select Outcome”
4. Select the outcome from drop-down menu next to “Referral Outcome”
5. Click “Save & Exi**t”**

Exit

***An EXIT is created when: client has entered another project type or otherwise found housing; has become engaged with another outreach worker or project; is deceased; or the outreach worker has been unable to locate the client for an extended period of time and there are no recorded contacts (length of time defined by State PATH Contact)**

1. Confirm you are in EDA mode to the correct provider and backdate to the date of Exit
2. Click on pencil next to Exit in Entry/Exit
3. Select Destination from drop-down menus (Reason for Leaving is optional), then Save & Continue
4. Fill out the PATH Exit Assessment that appears fully, updating where appropriate
5. Click “Save & Exit”

REPORTS

***The same PATH Report is used for both data-checking and gathering data for PDX submission**

1. Click the Reports tab on the left side of the main screen (not in ART)
2. Click on “PATH”
3. Search for and enter the desired PATH provider into the Provider prompt
4. Enter the exact start and end dates of the reporting period
5. Choose “This Provider Only”
6. Click “Build Report”
7. Click on the numbers in the tables in order to see which clients are being pulled into data fields
8. Click on the numbers in the tables that say, “Data Not Collected” or “Missing” in order to see what needs to be corrected
9. Highlight and/or download from the tables as needed
10. After all corrections have been made, follow the Instructions from HHS PATH for completing your PDX

PATH Services & Referrals Crosswalk provided by Bowman/Mediware

4.14A – Services Provided – PATH Funded

Record service for Head of Household when a service benefits the whole household; Services recorded only for Heads of Households and Adults; Record once, the first time the service is provided.

Type of PATH Funded Service Provided	Service Description	Service Code
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 and 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

4.16A – Referrals Provided – PATH

The Referrals Provided data element is required for both PATH Street Outreach and PATH Services Only projects. For each PATH referral users will have to record the Date of Referral, Type of Referral, select a "matching" service, and choose an outcome for each referral. Outcome picklist values = Attained, Not Attained, Unknown. PATH referrals must be recorded each time the referral is made for a client.

Type of Referral	Service Description	Service Code
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 abuse 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
Temporary Housing	Transitional Housing/Shelter	BH-8600
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

PATH Definitions from the HUD PATH Program HMIS Manual

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 in 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 (such as assisting a client access a shelter bed), without a deliberate client assessment or the beginning of a case plan, those interactions are not considered to be an engagement.

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.

Much more useful information may be found here:
https://www.hudexchange.info/resources/documents/PATHProgram-HMIS-Manual.pdf