FREQUENTLY ASKED PATH QUESTIONS

Contents

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Institute for Community Alliances

REPORT QUESTIONS

WHY ISN'T MY CLIENT COUNTING IN THE REPORT?

The PATH report is designed to show information about clients who were "active" during the report period, rather than all clients who have a valid entry/exit to a PATH provider during the report period.

To determine whether a client was "active" and should appear in the report, the report relies on some behind-the-scenes logic.

Here's how it works.

1. Active: This Report uses Active Client - Method 2 (Active Clients by Date of Service) from the HMIS Reporting Glossary to determine which clients to include in the reporting universe. These criteria apply to all of the dates for the purposes of determining an active client. The table below lists the date fields to use.

   [date] >= [report start date]
   And [date] <= [report end date]
   And [date] >= [project start date]
   And ([date] <=[project exit date] or [project exit date] is null)

   Where [date] is any of the following:

Field	Data Standards	Additional qualifications
[contact]	4.12	Requires that [contact] is identifying contacts with the client, not a case worker or housing specialist. If an HMIS is designed to capture other types of contacts, only count contacts with the client.
[date of engagement]	4.13	Where there is not a contact on the [date of engagement] count the date of engagement as a contact.
[PATH status - date of status determination]	P3	Use this date if there is not already a [contact] on the date and [client became enrolled in PATH] = 1 ("yes").
[services provided – PATH funded]	P1	Use this date if there is not already a [contact] on the date.

1. From the HMIS Programming Specifications - PATH Annual Report

What does that mean?

For a client to count in the report, they must have *at least one* of the following:

- A (correctly documented) Contact during the report period,
- A (correctly documented) Date of Engagement during the report period,
- A (correctly documented) Date of PATH Status Determination during the report period, or
- A (correctly documented) PATH service during the report period

Additionally, most counts in the report are counts of clients who were both active *and* enrolled during the report period. Here's how the logic counting a client as active/enrolled works:

> Active/Enrolled: Active/Enrolled clients are those identified in the Active universe but only those with a [PATH status] (P3) of "enrolled" (1) prior to or on the end of the reporting period.
>
> ("Active" as defined in #1)
> And [PATH status - client became enrolled in PATH] = 1
> And [PATH status - date of status determination] <= [report end date]
> And [PATH status - date of status determination] >= [project start date]
> And ([PATH status - date of status determination] <= [project exit date] or [project exit date] is null)

2.From the HMIS Programming Specifications - PATH Annual Report

In other words, for a client to count in the report as active/enrolled:

- The question "Client became enrolled in PATH" must be answered "Yes" in the entry/exit,
- The question "Date of PATH Status Determination" must have a date on or before the report end date,
- The question "Date of PATH Status Determination" must have a date on or later than the client's Project Start Date, *and*
- The question "Date of PATH Status Determination" must have a date on or before than the client's Exit Date (or the client must not have an Exit Date)

Less used in the report, but still important, is the distinction of a client as new/active.

> New/Active: New/Active clients are those identified in the Active universe but only those with [project start date] (3.10) during the reporting period should be included. Clients should be counted regardless of PATH enrollment.
>
> ("Active" as defined in #1)
> And [project start date] >= [report start date]
> And [project start date] <= [report end date]

3. From the HMIS Programming Specifications - PATH Annual Report

In other words, for a client to count as new/active, they must meet the "active" criteria, and have a Project Start Date during the report period. Clients in this category are counted even if they do not have a "Date of PATH Status Determination".

WHICH CATEGORIES APPLY TO WHICH REPORT QUESTIONS?

Question	Category of clients counting
Persons served during the reporting period	
8. Number of persons contacted by PATH-funded staff this reporting period	Active
9. Number of new persons contacted this reporting period in a PATH Street Outreach project	New / Active
10. Number of new persons contacted this reporting period in a PATH Services Only project	
11. Total number of new persons contacted this reporting period (#9 + #10 = total new clients contacted)	
12a. Instances of contact this reporting period prior to date of enrollment	Active / Enrolled
12b. Total instances of contact during this reporting period	
13. Number of new persons contacted this reporting period who could not be enrolled because of ineligibility for PATH	New / Active
14. Number of new persons contacted this reporting period who became enrolled in PATH	
15. Number with active, enrolled PATH status at any point during the date range	Active / Enrolled
16. Number of active, enrolled PATH clients receiving community mental health services through any funding source at any point during the reporting period	
Services	
17a. Reengagement	Active / Enrolled
17b. Screening	
17c. Clinical Assessment	
17d. Habilitation/rehabilitation	
17e. Community Mental Health	
17f. Substance use treatment	
17g. Case management	
17h. Residential support services	
17i. Housing minor renovation	
17j. Housing moving assistance	
17k. Housing eligibility determination	
17l. Security deposits	
17m. One-time rent for eviction prevention	
Referrals	
Community mental health	Active / Enrolled
Substance use treatment	
Primary health/dental	
Job training	

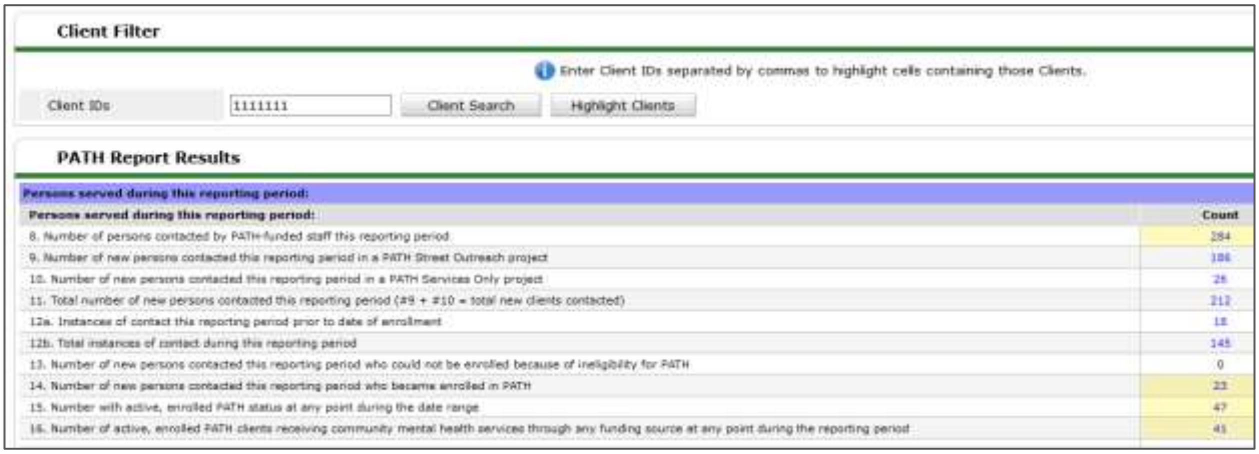
Question	Category of clients counting
Educational services	
Housing services	
Temporary housing	
Permanent housing	
Income assistance	
Employment assistance	
Medical Insurance	
Outcomes	
Income from any source	Active / Enrolled (divided into leavers and stayers)
SSI/SSDI	
Non-cash benefits from any source	
Covered by health insurance	
Medicaid/Medicare	
All other health insurance	
Destination	
Destination at Exit	Active / Enrolled (leavers only)
Demographics	
Gender	Active /Enrolled
Age	
Race	
Ethnicity	
Veteran Status	
Co-occurring disorder	
SOAR connection	
Living Situation at Project Start	
Length of stay in prior living situation	
Chronically homeless at project start	

HOW CAN I CHECK WHETHER A CLIENT SHOULD BE COUNTING AND ISN'T?

The PATH Data Completeness report can help identify clients who had a Contact, a Service Transaction, and/or a Referral during the report period.

You may need to toggle back and forth between the "Client Detail" tab and the "Services", "Referrals" or "Outreach" tab to ensure clients who had a Contact, Service Transaction, and/or Referral also should count as active or active/enrolled as defined above.

Another quick tip: if you want to spot-check whether a client who appears in the "Services", "Referrals" or "Outreach" tab of the PATH Data Completeness report is appearing in the PATH 2019 report, find their client ID in one of those tabs and use the "Highlight Clients" feature in the PATH 2019 report to identify whether and where the client is counting.



Client Filter

Enter Client IDs separated by commas to highlight cells containing those Clients.

Client IDs 1111111 Client Search Highlight Clients

PATH Report Results

Persons served during this reporting period:

Persons served during this reporting period:	Count
8. Number of persons contacted by PATH-funded staff this reporting period	284
9. Number of new persons contacted this reporting period in a PATH Street Outreach project	186
10. Number of new persons contacted this reporting period in a PATH Services Only project	26
11. Total number of new persons contacted this reporting period (#9 + #10 = total new clients contacted)	212
12a. Instances of contact this reporting period prior to date of enrollment	18
12b. Total instances of contact during this reporting period	145
13. Number of new persons contacted this reporting period who could not be enrolled because of ineligibility for PATH	0
14. Number of new persons contacted this reporting period who became enrolled in PATH	23
15. Number with active, enrolled PATH status at any point during the date range	47
16. Number of active, enrolled PATH clients receiving community mental health services through any funding source at any point during the reporting period	41

If you believe the client should be counting in the PATH 2019 report and isn't, review their client record to see if one of the errors described in the next section applies.

HOW CAN I ADDRESS ERRORS (OR PREVENT THEM)?

Because there are so many requirements involved in the counting logic, there are a lot of potential data entry errors that can cause a client to not count in the report.

The following are the most common:

- The "Date of PATH Status Determination" is before the Project Start Date
- There are no recorded contacts or services for the client during the report period (a client with only a referral documented will not count)
- There are recorded contacts, but all contacts took place after the client's project start and were recorded in the Entry record rather than in an Interim Update

Here are some quick tips to use while doing data entry to ensure clients will count as expected:

- If a client enters a PATH program after having been in another PATH program, and is enrolled, make sure to save a new value for "Date of PATH Status Determination".
- If the client isn't engaged and enrolled on the same day as their first contact, record "Date of Engagement" and "Date of PATH Status Determination" in an Interim Update, not in the Entry record.
- Record all contacts after the client's Project Start Date in an Interim Update, not in the Entry record.
- Record a contact, in an Interim Update, for every service and referral you record.

DATA ENTRY QUESTIONS

FROM ENTRY TO ENROLLMENT

There are unique data entry requirements for the PATH program in the time between a client's first contact with a PATH worker and their enrollment in the program.

WHAT'S THE DIFFERENCE BETWEEN PROJECT ENTRY, FIRST CONTACT, ENGAGEMENT, AND ENROLLMENT?

Project Entry is captured in HMIS as Project Start Date. This is when the client is first contacted, also captured in HMIS as Date of First Contact. **Engagement** is captured in HMIS as Date of Engagement. This is when the relationship goes to the next level and an assessment or case plan is completed with the client. **Enrollment** (captured in HMIS as Client Became Enrolled in PATH / Date of PATH Status Determination) is when the client is officially enrolled in PATH and becomes eligible for services and referrals.

TIPS AND TRICKS

- Project Start Date and Date of First Contact should always be the same date.
- Project Start Date, Date of Engagement, and Date of PATH Status Determination *can*, but will not always, be the same date.
- If Engagement and Enrollment do not happen on the same date as the first contact, record them in an Interim Update rather than in the Entry record.
- Date of Engagement is the trigger for full HMIS data quality – a client record without a Date of Engagement is not subject to data quality standards.

IMPORTANT! HOW DOES THE ROI FIT IN?

If the PATH worker is unable to present the client with the HMIS ROI *at the first contact*, you should still do a project entry and record contacts, but the client record must be closed. See the HMIS ROI FAQ (starting p.7) for instructions on closing a client record.

If you search for the client and find an open record in the system with a documented ROI, you can use that record and do not need to re-present them with the ROI (unless you are a HIPAA-covered agency – then you must re-present the ROI).

If the worker is able to present the client with the HMIS ROI at the Date of Engagement, do the following:

- If the client **does not** consent to sharing, keep using the closed record and follow the previously outlined steps to document engagement and enrollment.

- If the client does consent to sharing, create a new, shared record for the client. Project Start Date, Date of Engagement, and Date of First Contact should match the date the ROI was signed.

If there is now both a closed and an open record for the client, the PATH Report will de-duplicate these records and understand that both records belong to a single person, as long as the personally identifiable information (name, gender, DOB, SSN) on both records match.

- If you did not have the personally identifiable information for the client until they were engaged/assessed/signed the ROI, enter that information in the shared record AND go back and enter that info in the closed record so the system can recognize they belong to the same person.
- Do not re-enter contacts in the open record if they took place before the ROI was signed.

WHICH PROVIDER SHOULD I ENTER CLIENTS INTO?

Which PATH HMIS data entry provider to enter a client into depends on the client's answer to the question "Where did you stay last night?"

If the client answers with a place not meant for human habitation, enter the client into the Street Outreach provider. If the client answers with a place meant for human habitation, enter the client into the Support Services Only provider.

If the client does not answer at the time of first contact, wait to enter them into HMIS.

If you see the client again, and they answer the question "Where did you stay last night?" enter them into the provider corresponding to their answer.

If you do not see the client again, enter the client into the Support Services Only provider.

PATH guidance states that you do not need to move a client from one provider to another if you learn the provider you entered them in does not match their actual primary residence, *or if their residence changes*.

HOW DO CONTACTS WORK?

A **PATH Contact** is an interaction between a PATH-funded worker and an individual who is potentially PATH-eligible or enrolled in PATH.

- A contact should be recorded any time an interaction takes place. An interaction can happen in person or over the phone, if the client is present.
- A third-party interaction, such as a phone call with the client's case manager, where the client is not present or on the phone, does not count as a contact and does not need to be recorded.

Any contact after the First Contact should be recorded in an Interim Update. You can record multiple Dates of Contact in a single interim update, if they all took place before or on the date of the Interim Update.

Refer to the User Guide or the Data Entry Video for instructions on recording contacts.

TIPS AND TRICKS

- A contact will not count properly for reporting purposes if it is recorded in the Entry record but dated after the client's Project Start Date.
- A contact will not count properly for reporting purposes if it is recorded in an Interim Update but dated after the Update date.
- *Note*: this information also applies to all contacts recorded after enrollment.

AFTER ENROLLMENT

Once an individual is enrolled, data entry is relatively simpler and narrows to recording Services and Referrals. Contacts may also be recorded at this time.

HOW DO SERVICES WORK?

A **PATH Service** is a specific PATH-funded assessment, benefit, or form of assistance provided to a PATH-enrolled individual.

- PATH requires only one service recorded per service type provided per client, but you may choose to record each instance of a service.
- If a service is recorded, a contact should also be recorded.

Refer to the Data Entry Video for instructions on recording services.

TIPS AND TRICKS

- A service will not count properly for reporting purposes if it is missing a "Type of PATH FUNDED Service Provided". Refer to the Services Crosswalk in the User Guide to find the service code to record in HMIS.
- You do not need to record every instance of a service, but if you are providing ongoing services to a client, you should record at least one service per service type provider per reporting period.
- You do not need to update the Need Status or Outcome of Need for the service to count properly for reporting purposes.

HOW DO REFERRALS WORK?

A **PATH Referral** is a referral from a PATH worker to a non-PATH funded assessment, benefit, or form of assistance on behalf of a PATH-enrolled individual.

- PATH requires only one referral recorded per referral type provider per client, but encourages recording a referral for each instance of a referral provided.
- Referrals have an additional required component: each referral should be marked as "attained," "not attained," or "unknown" as of the report period end or the client's project exit.

Refer to the Data Entry Video for instructions on recording referrals.

TIPS AND TRICKS

- A referral will not count properly for reporting purposes if it is missing a "Type of PATH Referral”. Refer to the Referrals Crosswalk in the User Guide to find the referral code to record in HMIS.
- If you are providing a service to a client through your agency but not funded by PATH, record that as a referral, rather than as a service.
- You do not need to update the Need Status, Outcome of Need, or Referral Outcome for the service to count properly for reporting purposes. You do need to update the “If any “Type of PATH Referral” made, select Outcome”.