HMIS USER GUIDE FOR HHS PATH SO & SSO PROJECTS

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

Contents

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.

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.
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.

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 entering data for a household, be sure to search for the head of household.
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 **Date of Outreach Contact** (same date as Entry) and fill in its pop-up sub-assessment.
    c. If the client becomes **Engaged**, **Enrolled** or **Connected to Project SOAR**, 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 Outreach 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 an **Outreach Contact** 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; Outreach Contacts, 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. <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; Outreach Contacts, 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.

DATA COLLECTION FORMS

DATA COLLECTION FORMS FOR HHS:PATH PROJECTS CAN BE FOUND BY FOLLOWING THE LINKS PROVIDED BELOW OR VISITING THE FORMS AND INSTRUCTIONS PAGE ON THE MINNESOTA HMIS WEBSITE. THESE FORMS WILL CHANGE AS NEW DATA STANDARDS ARE RELEASED ANNUALLY ON JULY 1 (MINNESOTA) AND OCTOBER 1 (HUD).

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 in order to capture the required information for other members of a household that your PATH project serves.

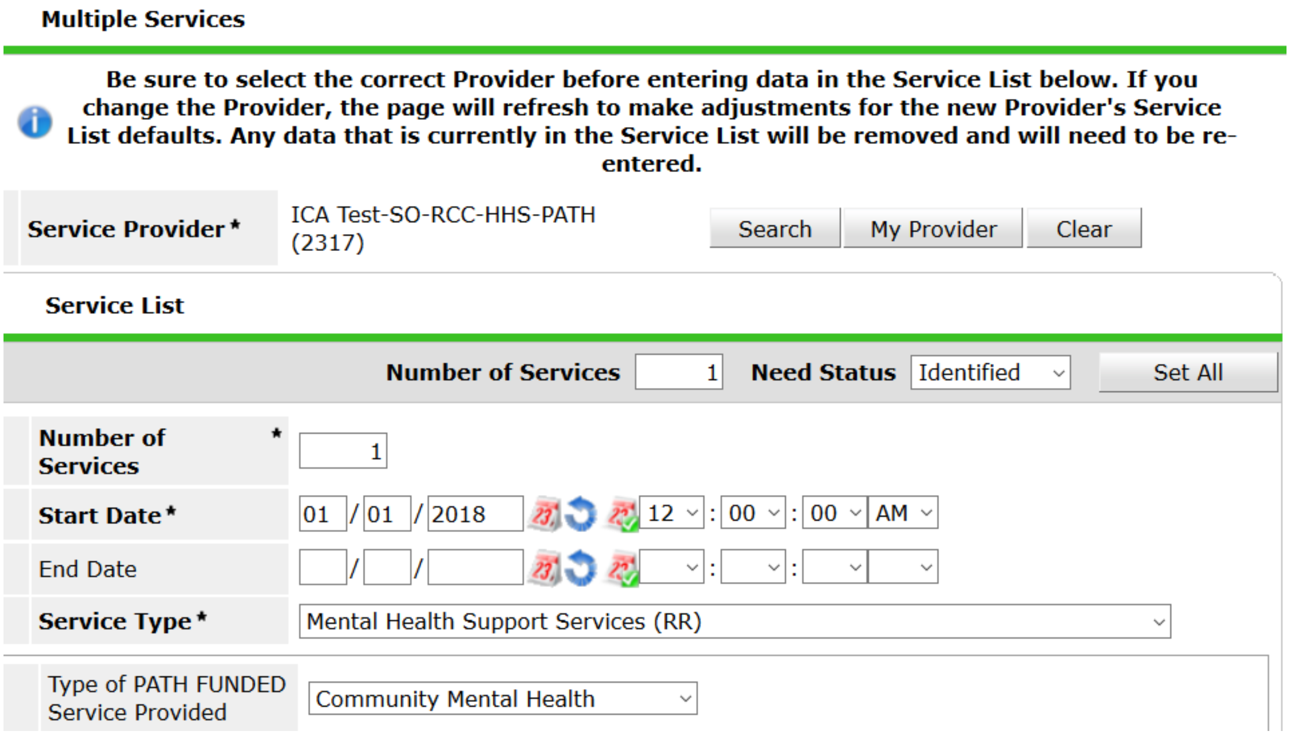
HMIS DATA COLLECTION FORM FOR PATH STREET OUTREACH (S0)

HMIS DATA COLLECTION FORM FOR PATH SUPPORTIVE SERVICES ONLY (SS0)

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.

P1 PATH-FUNDED SERVICES



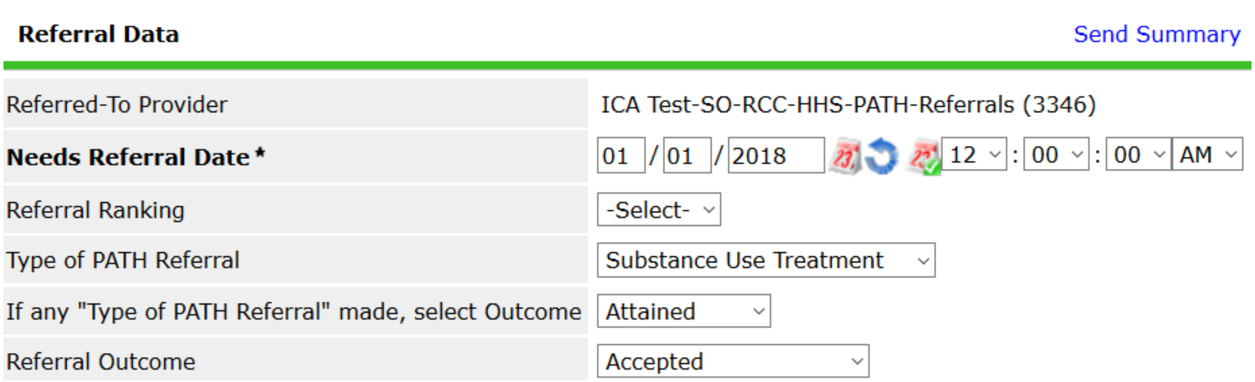
Project Type Applicability: 4: Street Outreach & 6: Supportive Services Only

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. 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.

P2 PATH REFERRALS



Project Type Applicability: Street Outreach and Supportive Services Only

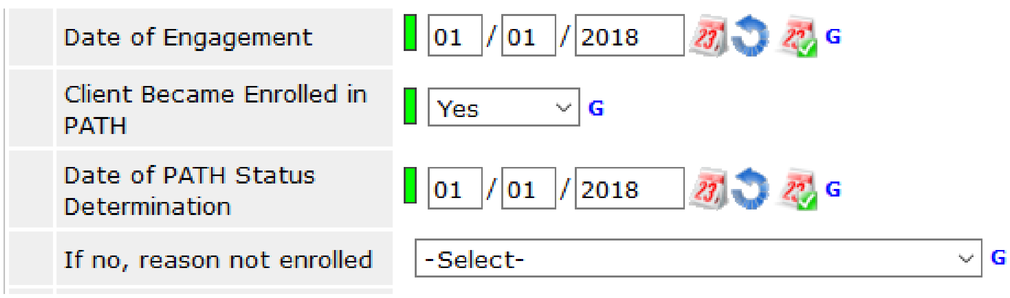
Data Collected About: Head of Household

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. Although clients are reported only once for each type of PATH Referral they received and once for each type of PATH Referral they obtained, 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 Project Exit.

P3 PATH STATUS



Project Type Applicability: Street Outreach and Supportive Services Only

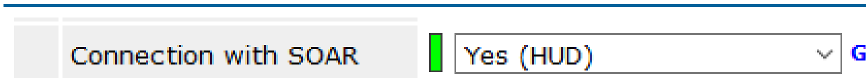
Data Collected About: Head of Household

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 Enrollment should be entered at the point that the client has become Enrolled. It may be on or after the Project Start date or Engagement date but prior to Project Exit. If the client exits without becoming Enrolled, the PATH Status element needs to be completed, indicating that the client was not Enrolled and the reason.

P4 CONNECTION WITH PROJECT SOAR



Project Type Applicability: Street Outreach and 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 MEDIWARE

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 Description	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 & 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 MEDIWARE

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	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 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

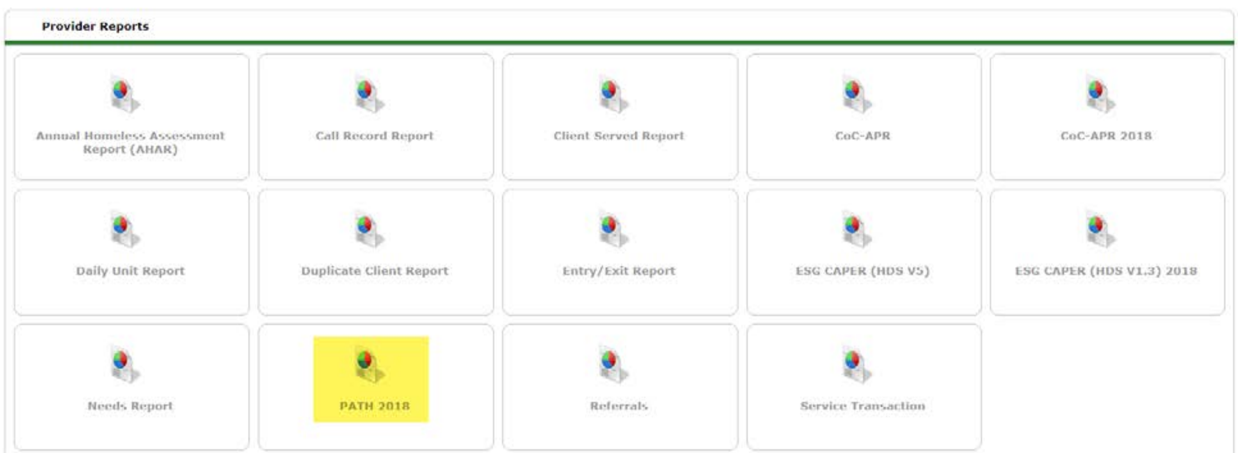
REPORTING GUIDELINES

This section introduces the data quality and funder-required reports for **PATH** projects. Users should run data quality reports regularly to ensure that accurate information is being provided to funders and other agencies. For information about reporting periods, due dates, and changes to requirements, refer to communications from funders.

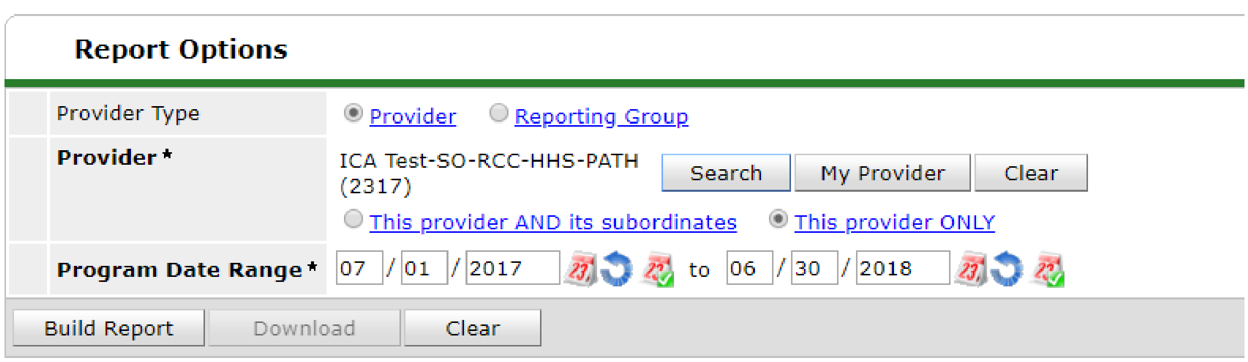
DATA QUALITY REPORTS

Name: PATH 2018

Location: Reports Dashboard

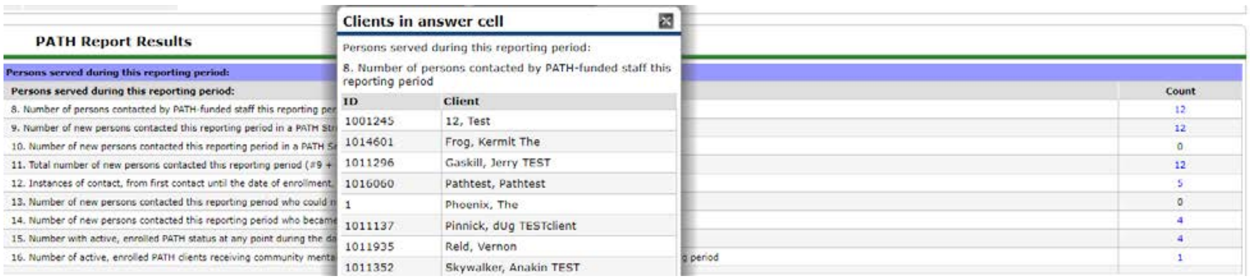


Required Prompts: Provider, Provider Type, Program Date Range



1. Click the Reports tab on the left side of the main screen (not in ART).
2. Select **PATH 2018.**
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.**

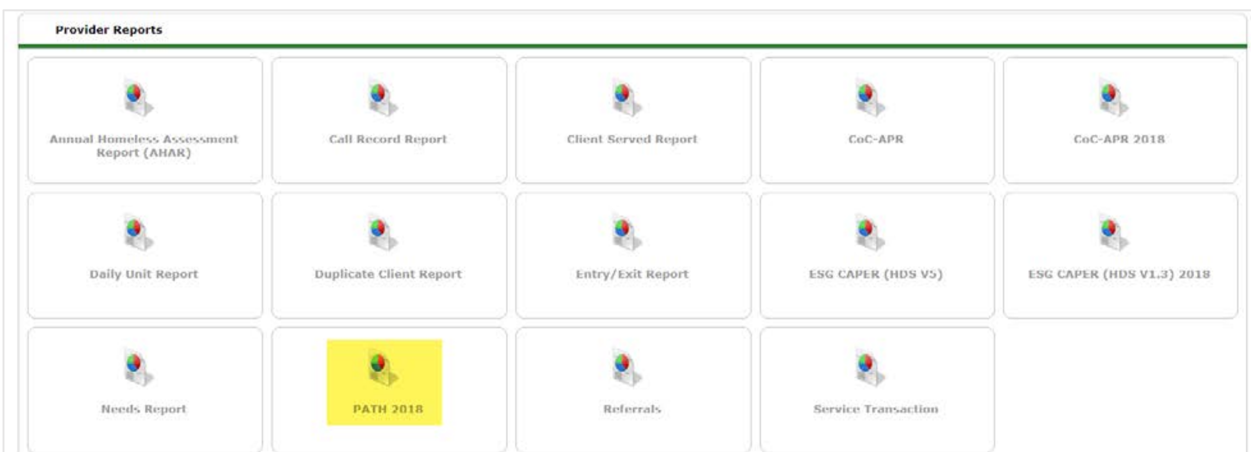
6. Click **Build Report.**
7. Click on the numbers in the tables in order to see which clients are being pulled into data fields.
8. Click on the numbers in the tables that say, “Data Not Collected” or “Missing” in order to see what needs to be corrected.
9. Highlight and/or download from the tables as needed.



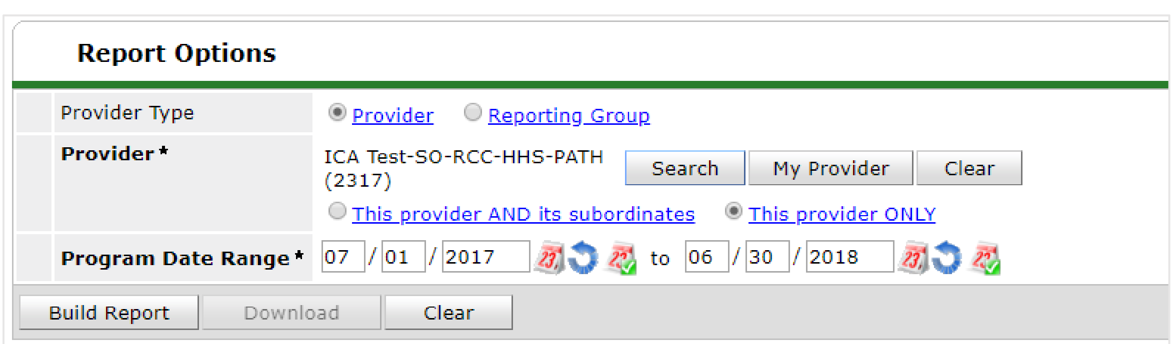
FUNDER-REQUIRED REPORTS

Name: PATH 2018

Location: Reports Dashboard



Required Prompts: Provider, Provider Type, Program Date Range



Submission Frequency: Quarterly and Annually

1. Click the Reports tab on the left side of the main screen (not in ART).
2. Select **PATH 2018.**
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 provided by the MN State PATH contact for submission to PDX.

Submission Instructions: Data generated by the PATH 2018 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.