



# HMIS PATH OUTREACH PROGRAM TRAINING

# AGENDA

## Welcome

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- Program Specific Data Elements
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# INTRODUCTION TO PATH OUTREACH PROGRAM



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# PATH PROVIDER GOALS

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SAMHSA has two primary goals for PATH programs in connection with PATH providers entering client data into their local HMIS:

- Clients can access permanent or temporary housing more effectively and efficiently through HMIS; many CoCs prioritize individuals for housing using their HMIS, with priority housing placement made for the most vulnerable persons (Coordinated Entry System).
- Clients can access a variety of supportive services that address their particular needs; such services are most often provided by partner agencies in the CoC and referrals can be made quickly and easily through the HMIS, often not requiring a separate client intake and/or application for service. This eliminates duplication of effort both for providers and clients.

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# PATH RESOURCES

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Additional information about the PATH Program and its requirements can be found on the [PATH Program](#) page including:

- [PATH Annual Report Manual](#)
- [PATH Program HMIS Manual](#)
- [PATH HMIS Participation Guidance](#)
- [PATH Data Exchange \(PDX\)](#)

# DATA COLLECTION PROCESS

DEFINITION OF TERMS



# CONTACT

A contact is defined as an interaction between a worker and a client. Contacts may range from a simple verbal conversation between the street outreach worker and the client about the client's well-being or needs or may be a referral to service. A contact must be recorded anytime a client is met, especially when an engagement date or date of enrollment is recorded on the same day. The first contact with a client = the project entry date in the HMIS.

# ENGAGEMENT

Date of engagement is defined as the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan. The date of engagement should be entered into HMIS at the point that the client has become engaged. It may be on or after the project entry date and prior to project exit. If the client exits without becoming engaged, the engagement date should be left blank. Data quality does not begin being considered for street outreach until the client is engaged.



# ENROLLMENT

The point at which the PATH-funded worker can determine if a person is eligible for the PATH Program. Only persons eligible for PATH can receive a PATH-funded service or referral. Additionally, the 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. HMIS Data Element P3 PATH Status provides additional information regarding PATH enrollment.


# PROJECT EXIT

We are encouraged to set a standard length of time that must pass without a client contact before the client is exited from the PATH project. In general, the period of time that passes from the date of last contact until project exit should be between 30 days and 90 days (or other length of time as established by the agency). Reengagement may happen within this timeframe but cannot occur after project exit has occurred. In this case, the Exit date will be dated as the date of last contact.



# PROJECT START DATE

Is the date of first contact between the  
PATH-funded worker and the client.



# 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.

# 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. Referrals are not services, if the PATH provider does not actually deliver the PATH-funded service it should be entered as a referral not a service.


# 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. Descriptions of PATH-funded services may be found in the PATH Annual Report Manual. Services are not the same as referrals, so if the PATH provider does not actually deliver the PATH-funded service it should be entered in HMIS as a referral, not a service.

# STREET OUTREACH COMPONENT


This HMIS project set-up component 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 homeless persons by connecting them with emergency shelter, housing, and/or critical health and mental health services.

Examples of persons who are living in places not meant for human habitation are those who sleep on the streets, under bridges, in camps, campgrounds, abandoned buildings, structure meant for animals, vehicles, and public places.



# CURRENT LIVING SITUATION ASSESSMENT

A Current Living Situation Assessment is required to be recorded at project start at every contact throughout the PATH program data collection process.





# DATA COLLECTION PROCESS: DATA QUALITY

The ability for a street outreach worker to obtain information (data collection) about an individual on the street and the ability to “engage” with the client is synonymous. If the worker does not know the client’s name, it is not possible that the client has become “engaged.”

No one should expect that prior to engagement, workers will have all the elements required for PATH completed on an individual client.

Data quality does not begin to be considered for street outreach until the client has been marked with a “date of engagement” in the HMIS.

# DATA COLLECTION PROCESS: STAGES

Record Creation – when an element has one and only one value (e.g., name)

Project Entry – Street outreach = date of first contact

Current Living Situation Assessment - at program start and at every contact thereafter

Update – when an element changes (e.g., income) with the information date identifying the date the data is collected or was relevant.

Annual Assessment – For all clients in project for one year, each year thereafter.

- The annual assessment is to be recorded no more than 30 days before or after the anniversary of the client's Project Entry Date, regardless of the date of the most recent 'update.' Information must be accurate as of the Information Date.
- Information must be recorded as an Annual Assessment or will not be reported in future APRs or Performance Measures.

Project exit – date of exit

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# DATA COLLECTION PROCESS: PROGRAM SPECIFIC DATA ELEMENTS

PATH Projects MUST collect:

- Physical Disability
- Housing Status
- Developmental Disability
- Contact
- Chronic Health Condition
- Date of Engagement
- Mental Health Problem
- Services Provided – PATH Funded
- Substance Abuse
- Referrals Provided – PATH
- PATH Status (Enrollment Status)

# DATA COLLECTION PROCESS: PATH STATUS

The HMIS data element P3 PATH Status is used to determine whether a client is eligible for the PATH program. Clients that reach enrollment should have one of the following PATH Status:

- Client became enrolled in PATH
- Client was found ineligible for PATH
- Client was not enrolled for other reason(s)
- Unable to locate client

If a client becomes enrolled in PATH, then an enrollment date is collected to identify the date when 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.

The date of PATH enrollment should be entered into the HMIS at the point that the client has become enrolled.

It may be on or after the project start date or engagement date and prior to project exit.

If the client exits the project without becoming enrolled, the PATH Status element still needs to be completed, indicating that the client was not enrolled and the reason the client was not enrolled.

If the client was contacted on the date that PATH Status was determined, a contact must also be entered for that date.

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## DATA COLLECTION PROCESS: CONNECTION WITH SOAR

- CoCs with a local SOAR program (initiative to improve access to SSI/SSDI benefits for those experiencing homelessness and mental illness) may choose to collect data on whether clients are connected to the program.
- This element is collected by project exit.
- Connection with SOAR is intended to determine if the client has been connected to the SOAR program, regardless of whether that connection was established by the PATH provider or not
- The connection to SOAR can be made prior to PATH involvement or post-PATH involvement: Have you ever been connected to SOAR?”
- Connection to SOAR can change during the client’s involvement with the PATH program and should be updated accordingly.

PATH-Funded Service	Definition
Re-engagement	The process of engaging with PATH-enrolled individuals who are disconnected from PATH services.
Screening	An in-person process during which a preliminary evaluation is made to determine a person's needs and how they can be addressed through the PATH Program.
Clinical assessment	A clinical determination of psychosocial needs and concerns.
Habilitation/rehabilitation	Services that help a PATH client learn or improve the skills needed to function in a variety of activities of daily living.
Community mental health	A range of mental health and/or co-occurring services and activities provided in non-institutional settings to facilitate an individual's recovery. <i>Note: This category does not include case management, alcohol or drug treatment, habilitation, or rehabilitation, as they are standalone services with distinct definitions.</i>
Substance use treatment	Preventive, diagnostic, and other services and supports provided for people who have a psychological and/or physical dependence on one or more substances.
Case management	A collaboration between a service recipient and provider in which advocacy, communication, and resource management are used to design and implement a wellness plan specific to a PATH-enrolled individual's recovery needs.
Residential supportive services	Services that help PATH-enrolled individuals practice the skills necessary to maintain residence in the least restrictive community-based setting possible.
Housing minor renovation	Services, resources, or small repairs that ensure a housing unit is physically accessible and/or that health or safety hazards have been mitigated or eliminated.
Housing moving assistance	Funds and other resources provided on behalf of a PATH-enrolled individual to help establish that individual's household. <i>Note: This excludes security deposits and one-time rental payments, which have specific definitions.</i>
Housing eligibility determination	The process of determining whether an individual meets financial and other requirements to enter public or subsidized housing.
Security deposits	Funds provided on behalf of a PATH-enrolled individual to pay up to two months' rent or other security deposits in order to secure housing.
One-time rent for eviction prevention	One-time payment on behalf of PATH-enrolled individuals who are at risk of eviction without financial assistance.

# PATH SERVICES: SPECIFIC DEFINITIONS

# PATH REFERRALS: SPECIFIC DEFINITIONS

PATH Referral	Definition
Community mental health	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 that stabilizes, supports, or treats people for mental health disorders or co-occurring mental health and substance use disorders.
Substance use treatment	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 that offers preventive, diagnostic, and other services and supports for individuals who have psychological and/or physical problems with use of one or more substances.
Primary health/dental care	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 that offers physical and/or dental health care services.
Job training	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 that helps prepare an individual to gain and maintain the skills necessary for paid or volunteer work.
Educational services	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 that offers academic instruction and training.
Housing services	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 that offers assistance with attaining and sustaining living accommodations.
Permanent housing	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 that offers residence in a stable setting where length of stay is determined by the individual or family without time limitations, as long as they meet the basic requirements of tenancy.
Temporary housing	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 that offers shelter in a time-limited setting.
Income assistance	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 that offers benefits that provide financial support.
Employment assistance	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 that offers assistance designed to lead to compensated work.
Medical insurance	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 that offers coverage that provides payment for wellness or other services needed as a result of sickness, injury, or disability.

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# SPECIAL DATA COLLECTION INSTRUCTIONS

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- Coordinated Entry
    - SAMHSA recognizes that many PATH projects, specifically street outreach projects, play an integral role in a community's Coordinated Entry System (CES).
    - PATH-funded projects are often an access point for CES, and the applicable data elements (4.19 Coordinated Entry Assessment and 4.20 Coordinated Entry Event) should be recorded.
  - Data Collection Challenges
    - Street Outreach projects may record a project start with limited information about the client and improve on the accuracy and completeness of client data over time by editing data in an HMIS as they engage the client.
    - The initial entry may be as basic as the project start date, an alias or other “made-up” name (e.g., Redhat Tenthstreetbridge) that would be identifiable for retrieval by the PATH-funded worker in the system. Over time, the data must be edited for accuracy (e.g., replacing “Redhat” with “Robert”) as the worker learns that detail.
  - De-Duplication of Clients Records
    - Please reach out to [Santacruz@bitfocus.com](mailto:Santacruz@bitfocus.com) to have duplicated clients merged



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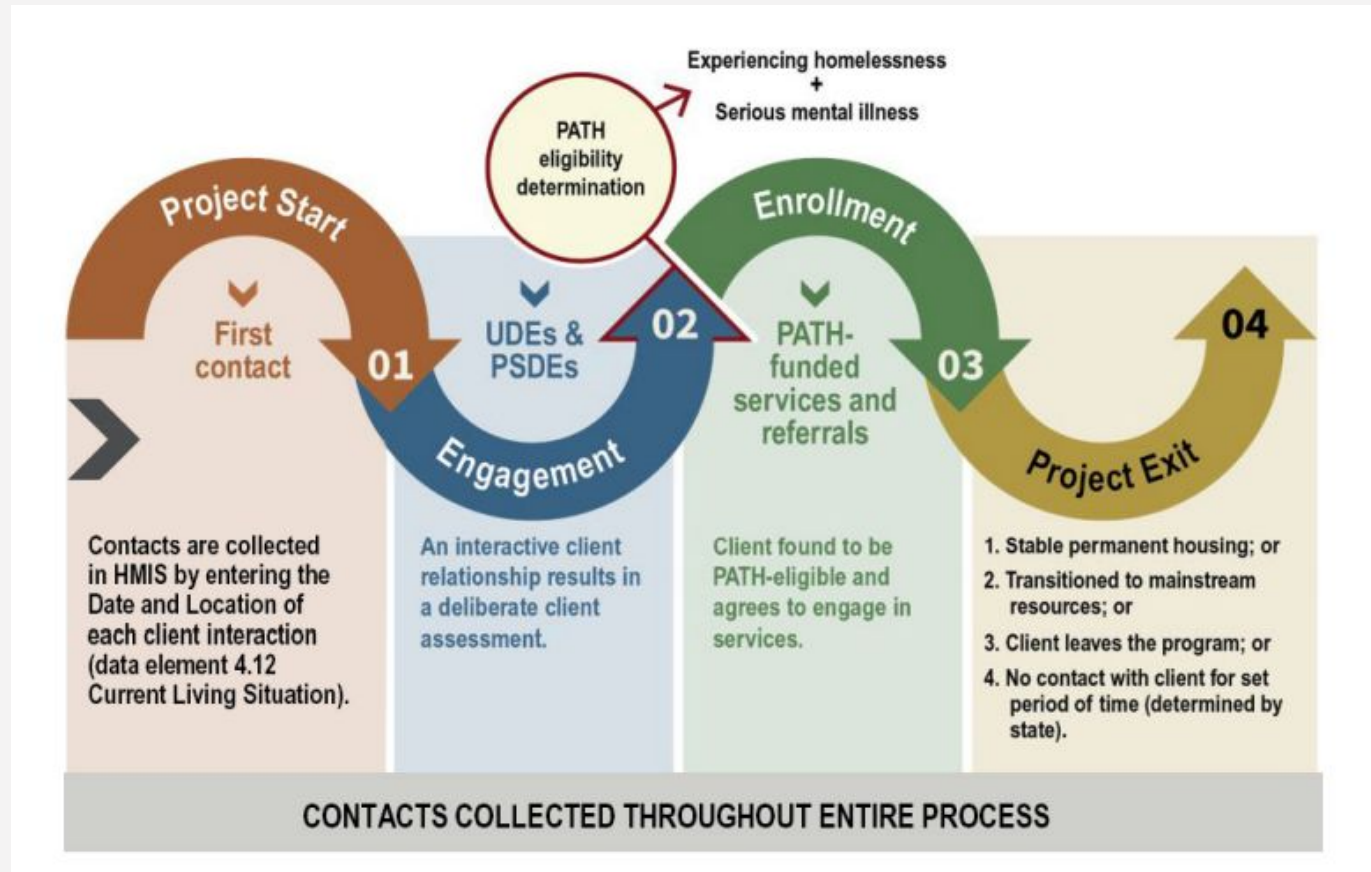
# PATH DATA COLLECTION WORKFLOW

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PATH Data Collection Workflow PATH data collection workflow is designed to support the interactions and development of relationships with clients over time.

- HMIS data quality does not begin until the date of engagement, or the point at which an interactive client relationship results in a deliberate client assessment.
- The date of enrollment may be on or after the project start date and on or after the date of engagement.
- It is possible that project start, engagement, enrollment, and project exit may all occur during a single contact at a single point in time.
- However, it is much more likely that project start will be followed by multiple contacts prior to date of engagement.

This chart illustrates the necessary sequence of data collection, which may happen in a day, or over a number of days, weeks, or even months, depending on the client's willingness to engage with the PATH project, eligibility for PATH-funded services and referrals, and continued connection to the project.





HOW-TO COMPLETE PATH  
PROGRAM ENROLLMENT:  
START TO FINISH



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