HMIS Data Entry Quick Guide – PATH - Full Intake

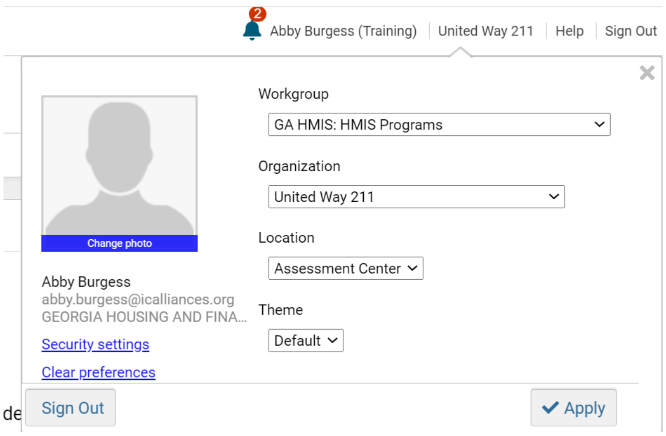
Updated 6/1/2021

Contents

PATH Workflow (Services Only and Street Outreach)

Login

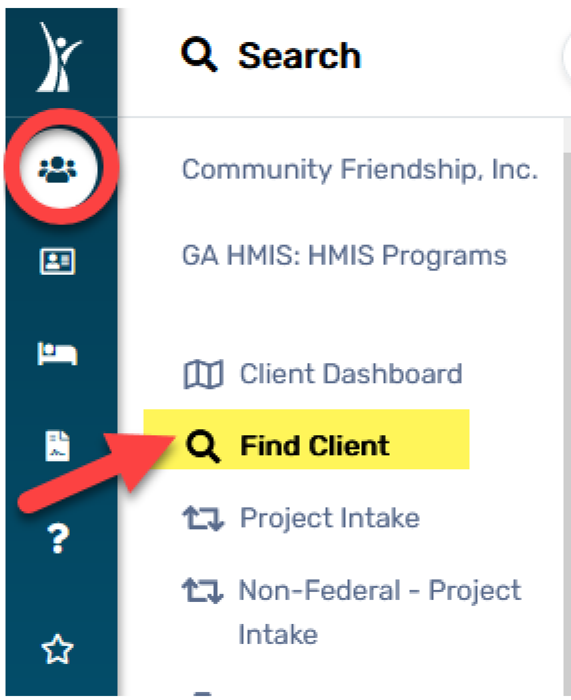
Users will login to GAHMIS: HMIS Programs workgroup under their Home or “funded” Organization



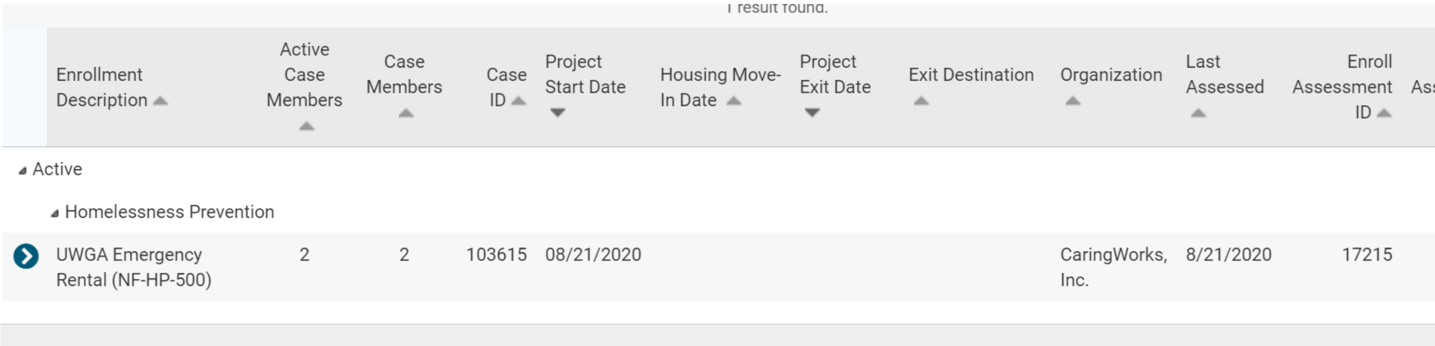
Enrolling a client into a PATH Project in HMIS

Navigate to Client Workspace

1. Find Client



2. Review the Client Dashboard for existing enrollments.

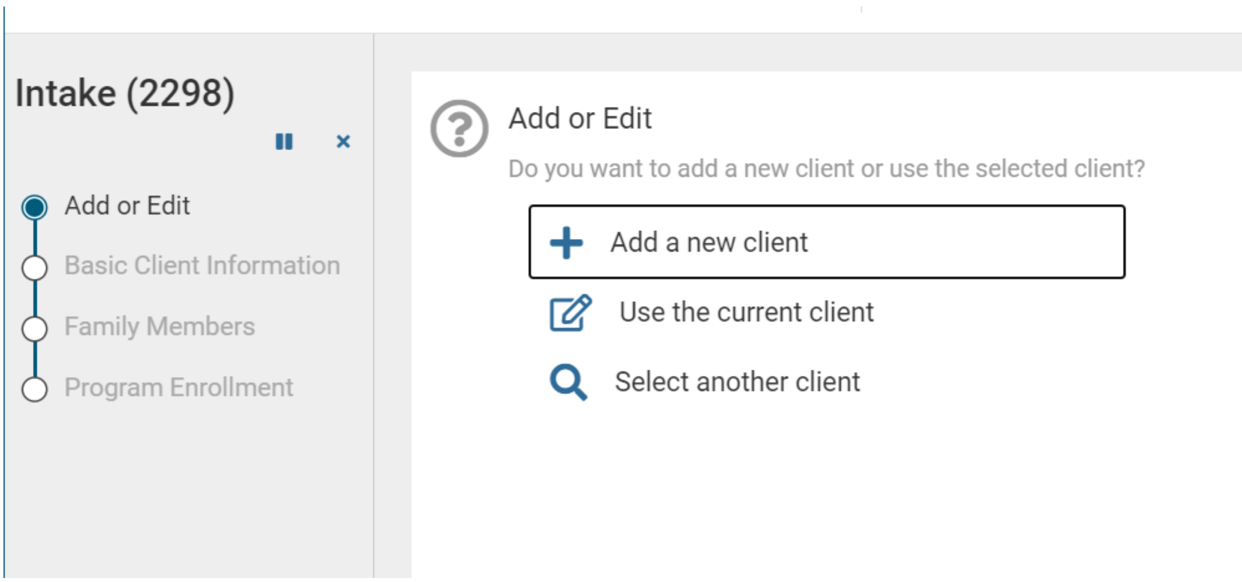


1 result found.

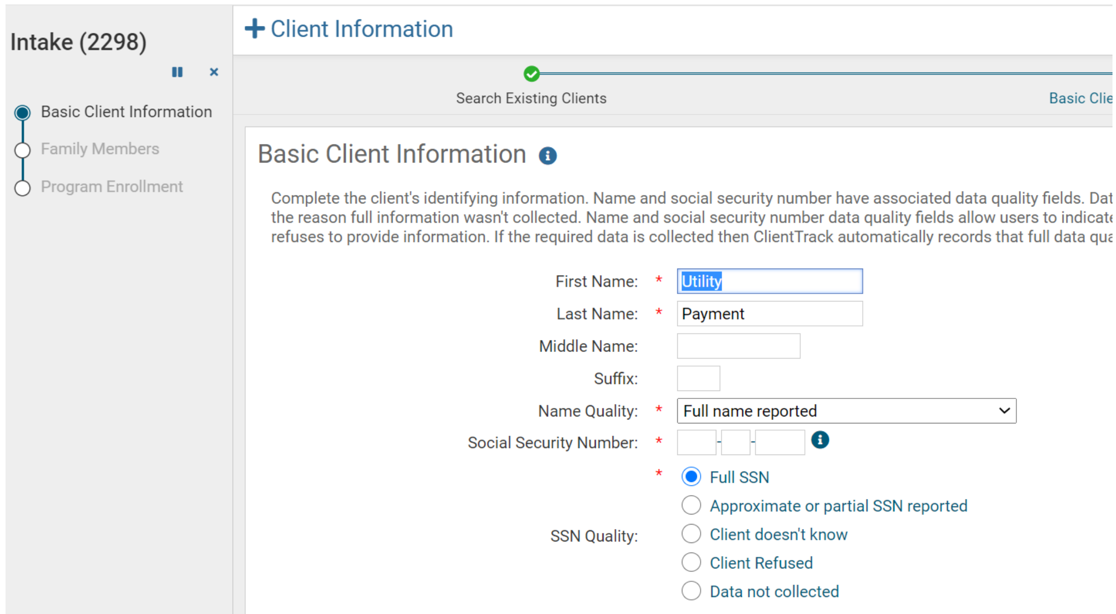
Enrollment Description	Active Case Members	Case Members	Case ID	Project Start Date	Housing Move-In Date	Project Exit Date	Exit Destination	Organization	Last Assessed	Enroll Assessment ID	Ass
Active											
Homelessness Prevention											
UWGA Emergency Rental (NF-HP-500)	2	2	103615	08/21/2020				CaringWorks, Inc.	8/21/2020	17215	

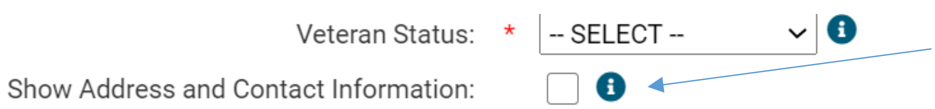
Enrollment Workflow

3. Launch "Project Intake"

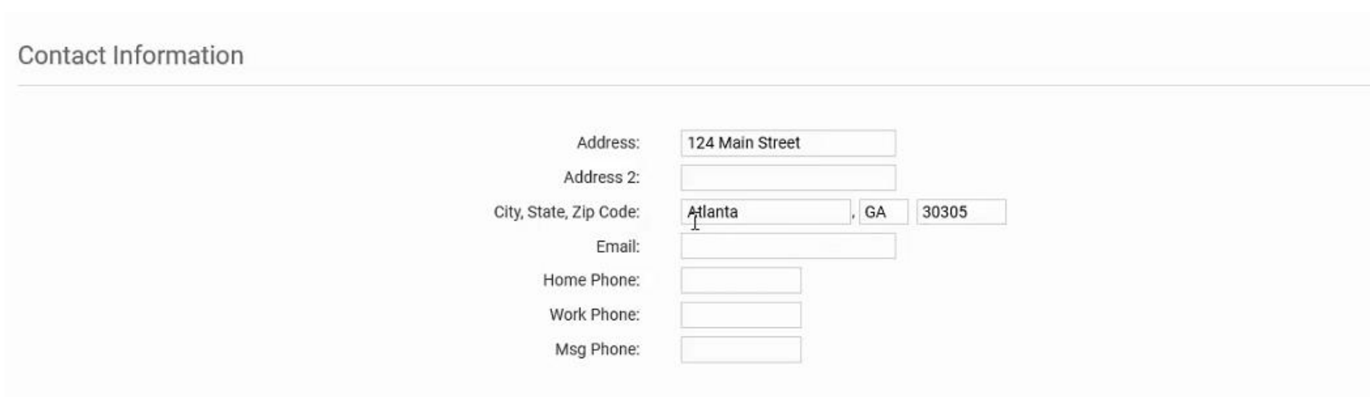


4. If you already searched, use the current client.
5. Add new client as needed.
6. Enter the Basic Client Information and Basic Client Demographics

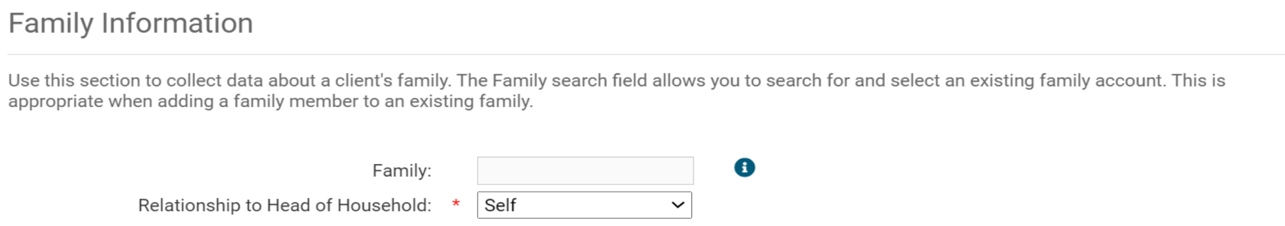




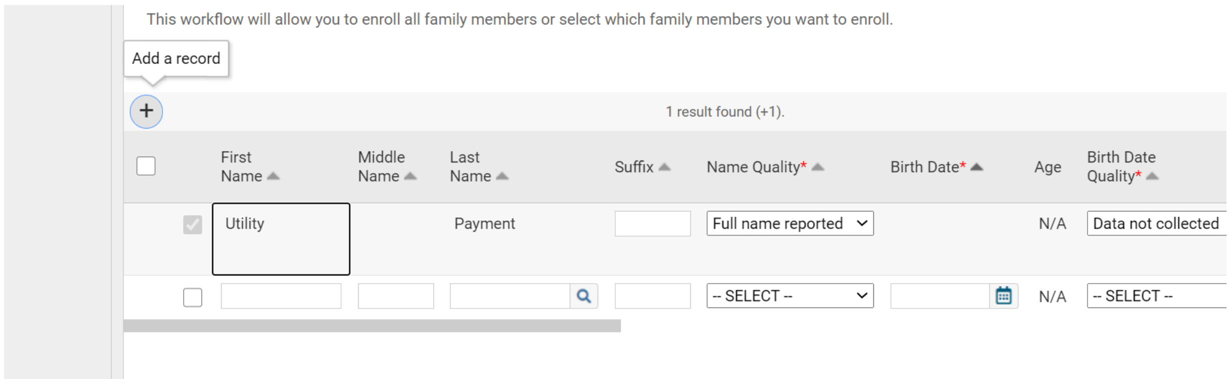
7. Add Contact information for the family.



8. Complete the family information. Participant should be listed as Head of Household. Click Finish.



9. Add family members to household as applicable. Save and close.

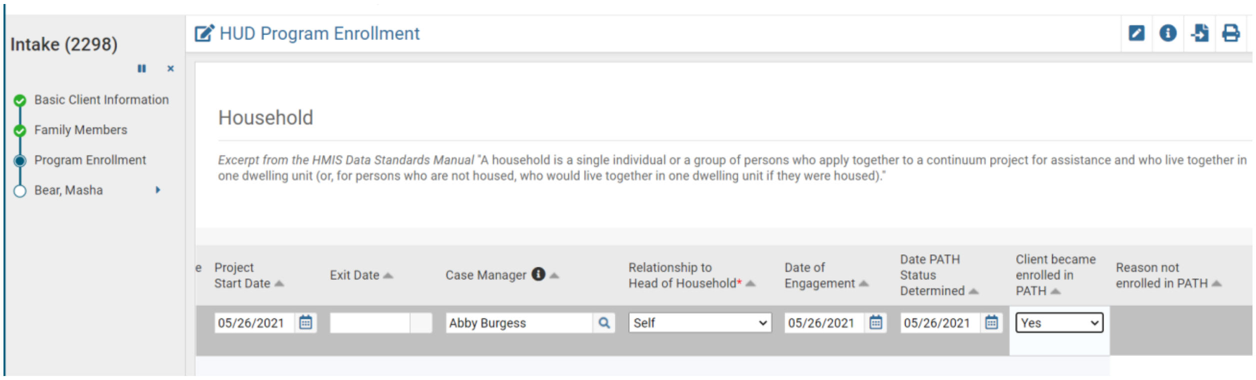


10. Complete the project enrollment and all workflow steps.

The Project Start Date is the date the client begins receiving services for the project, for PATH, this date is the same as the first contact with the client.

Project Name/ Type	Clients to Enroll
PATH Street Outreach	Clients living in places not meant for habitation at first contact (same as project start).
PATH Supportive Services	Clients living in places meant for habitation at first contact (same as project start), which includes emergency shelter and those who are at risk of homelessness.

NOTE: Clients should not have an enrollment in BOTH Street Outreach and Supportive Services at the same time. Additionally, clients do not need to be moved from one project type to the other after initial enrollment if their living situation changes during the enrollment.

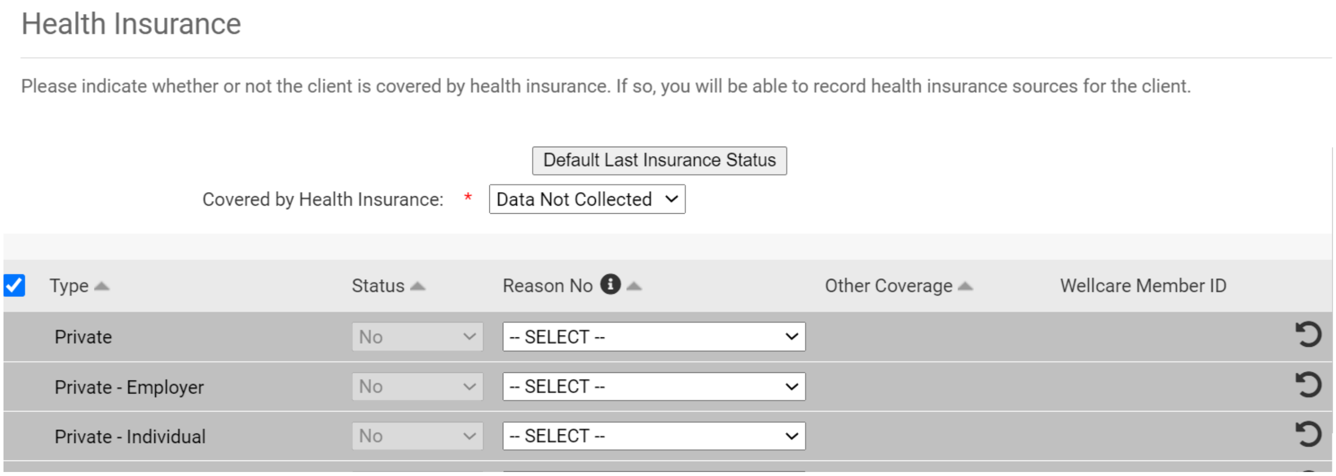


PATH Specific Project Enrollment Fields:

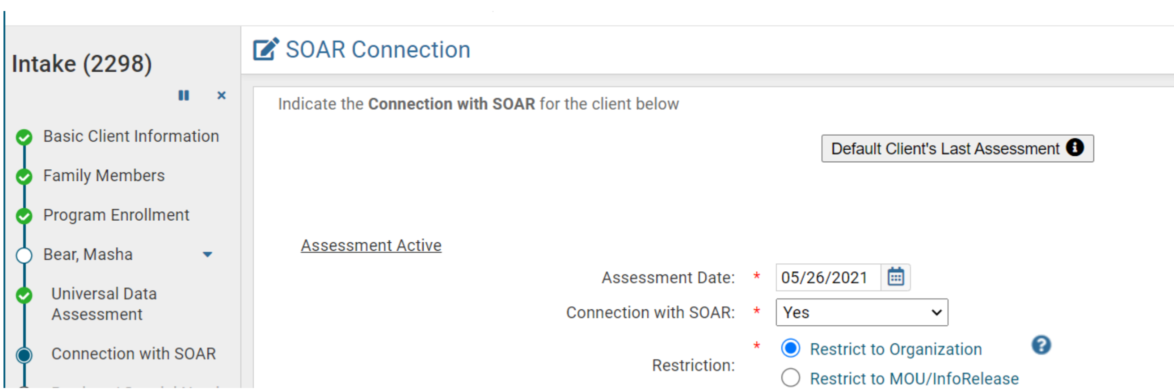
Enrollment Field	Guidance
Project Start Date	Date will match date of first contact. See project types above.
Exit Date	Clients living in places meant for habitation at first contact (same as project start), which includes emergency shelter and those who are at risk of homelessness.
Date of Engagement	Entered as a date (the point at which an interactive client relationship results in a deliberate client assessment or the beginning of a case plan). On or after project start date. DO NOT ENTER A DATE OF ENGAGEMENT UNLESS YOU HAVE THE COMMITMENT FROM THE CLIENT TO PARTICIPATE… add it later, when engagement occurs.
Date PATH Status Determined	Date added when enrollment and eligibility is confirmed. Also, used in APR code where there is not a contact when client becomes enrolled in PATH = Yes
Client became enrolled in PATH	Completed at the time PATH Status is determined (Y/N). Only persons with "Yes" response should have **PATH funded services/ referrals added to records.**
Reason not enrolled in PATH	Dependent field, complete only if client became enrolled in PATH = No. Response options: Client was found ineligible for PATH Client was not enrolled for other reason(s) Unable to locate client

11. Complete the HMIS Universal Data Assessment.
    - Required fields are marked with an * (red) on the screen.
    - Client Location = GA-500 – Atlanta CoC (unless project is funded outside Atlanta, then choose appropriate CoC for your grant funding and the clients service location.
    - Living Situation information is where the client is currently residing, this was previously established when choosing the project type for the enrollment!

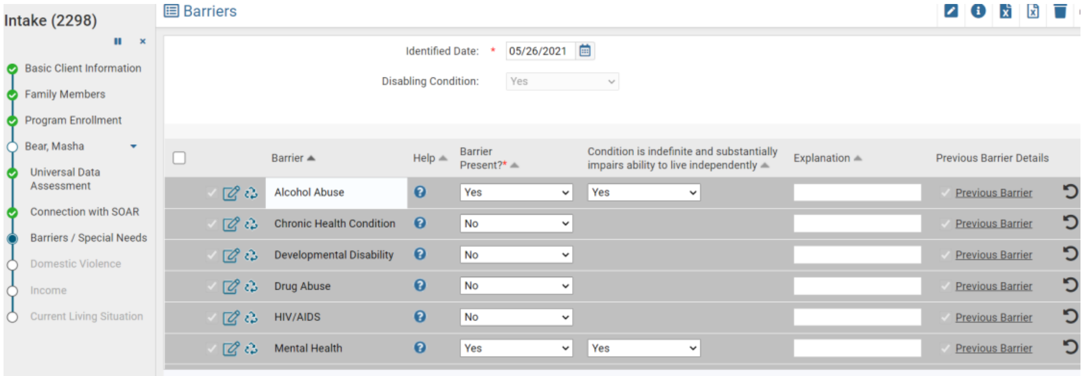
12. Complete health insurance. Use "Default Last Insurance Status" button for existing clients.



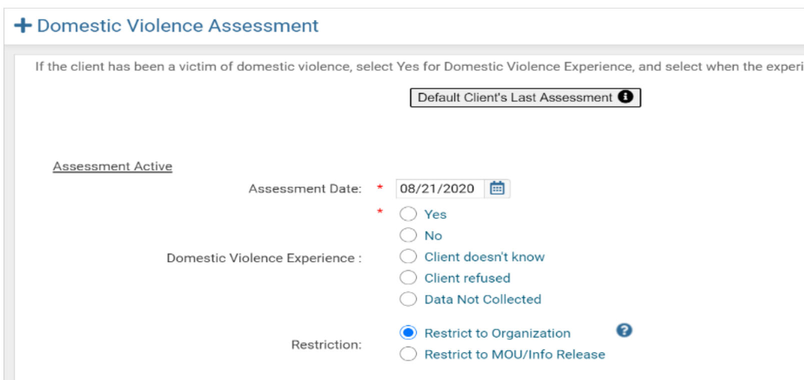
13. Complete "SOAR Connection" assessment.



14. Complete the Barriers/ Special Needs (disabling conditions) as applicable. Note: conditional fields are present on the worksheet. Ensure multiple barriers are marked as needed. These fields are used to determine co-occurring disorders.

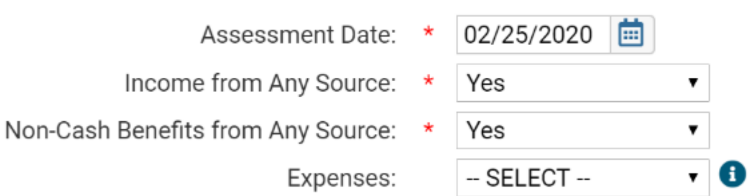


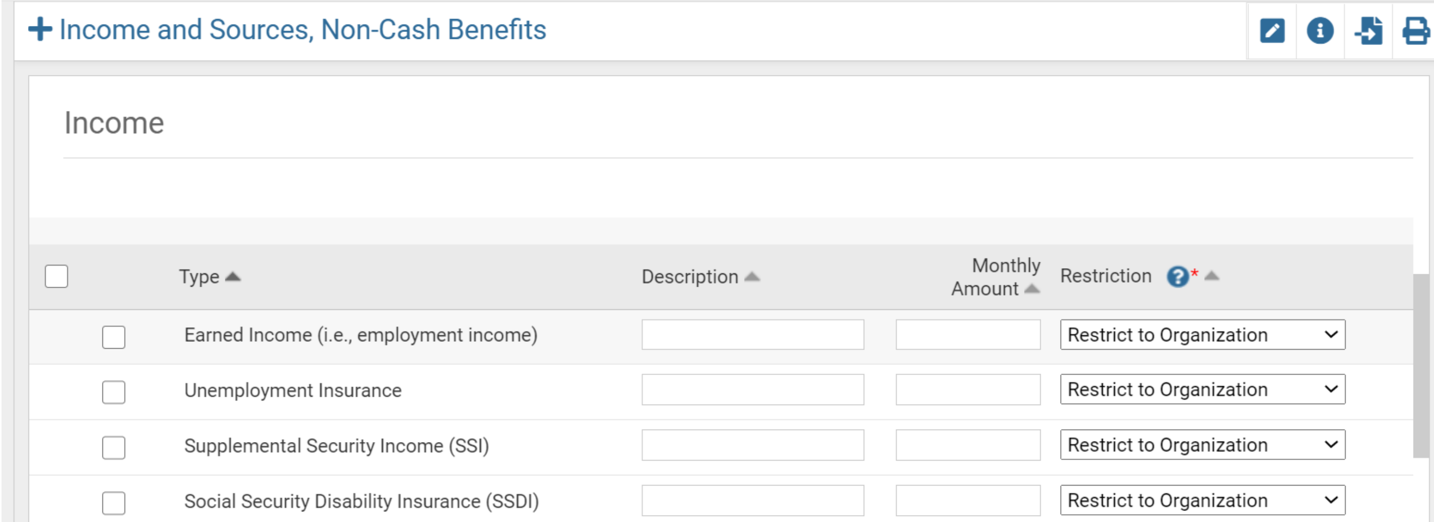
15. Complete the Domestic Violence Assessment (note conditional fields on this form)



16. Complete Income and Sources, Non-Cash Benefits

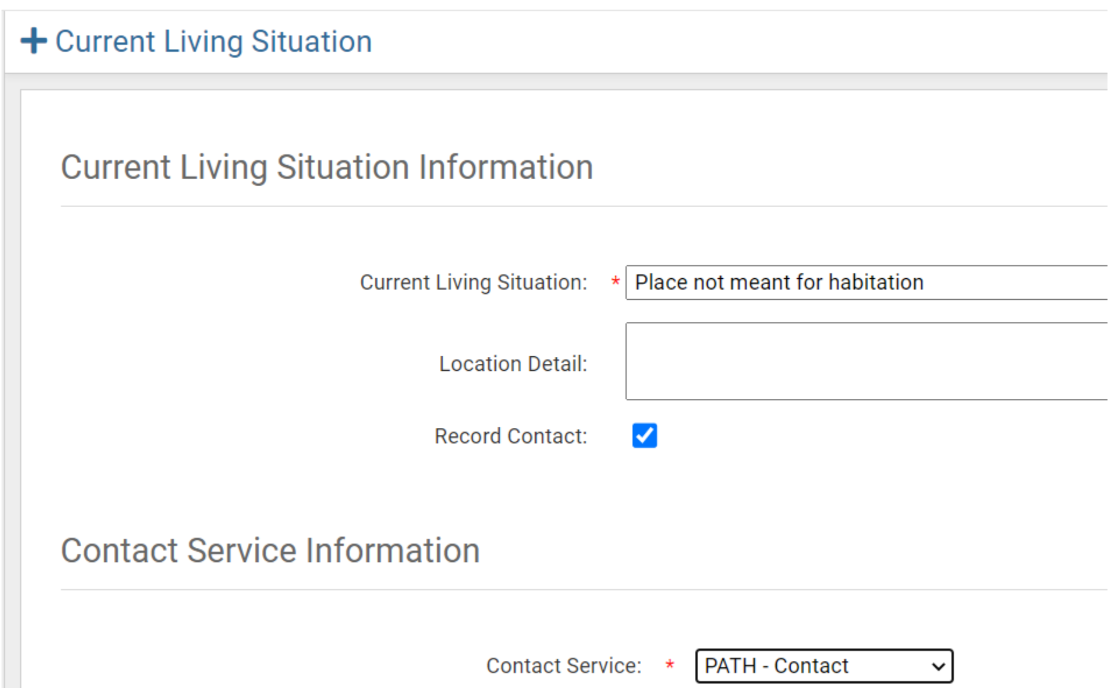
for any sources with a Yes, complete the full details. With the amounts of the income for each source.





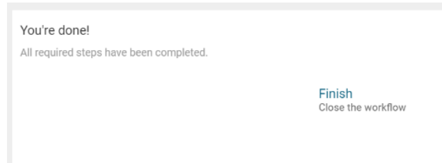
17. Complete the "Current Living Situation" for the client.

The current living situation was established when choosing the project type for the client. Record contact will be auto-checked (effective 7.21.2021) . The user should then select a contact service - "PATH- Contact" for the client record. This allows the "auto exit" feature to activate for clients without services.

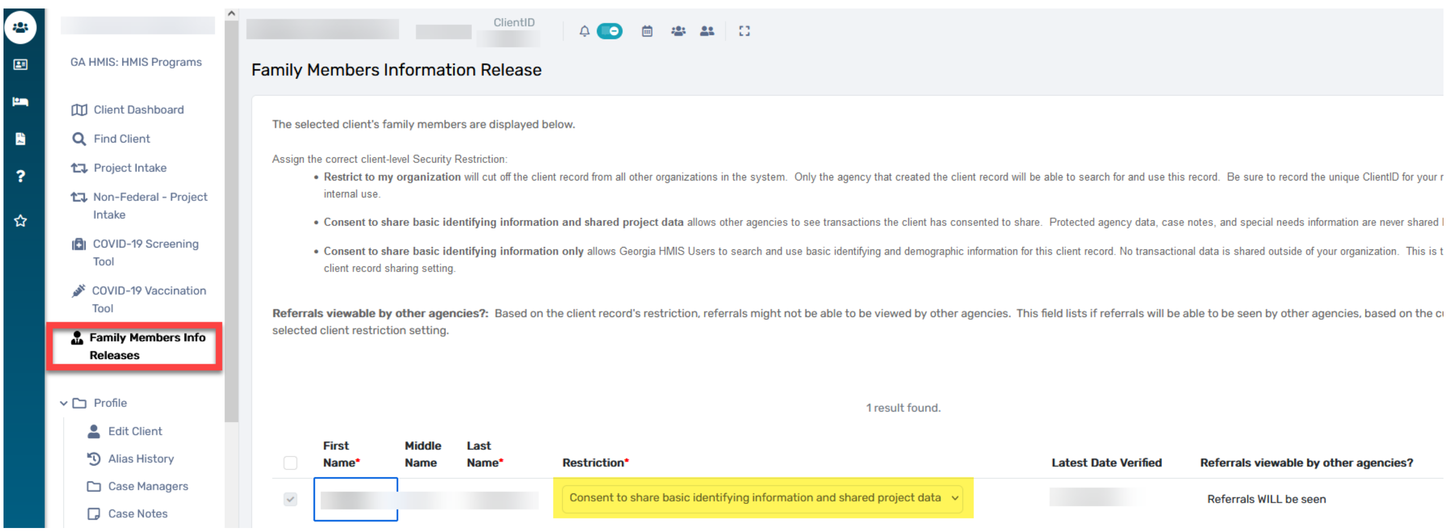


18. For households, the required workflow will load for each client.

19. Enrollment Workflow is complete!



CHECK Release of Information Status when using an existing client record to ensure it is shared/ not shared according to your agencies polices. New clients will be shared automatically.

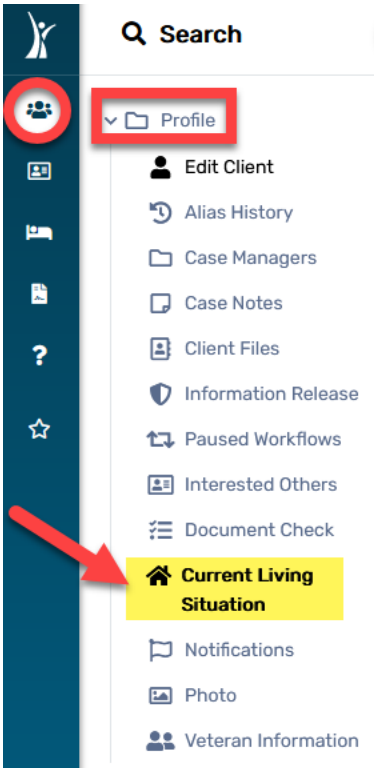


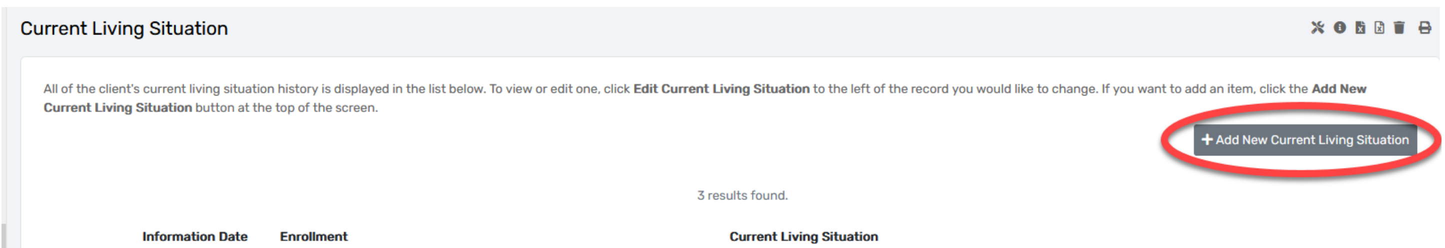
If the restriction needs to be updated, by selecting the updated information from the drop down menu under “Restriction” (highlighted above) and click Save.

A shared record will indicate “Client is Sharing Demographics and Transactional Data in Green” on the client dashboard.

Current Living Situation

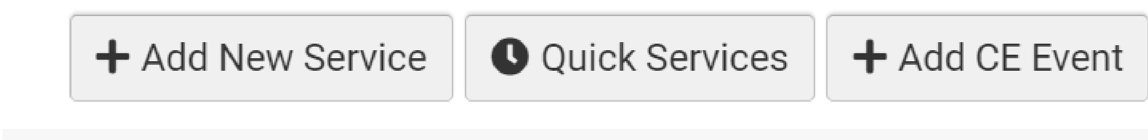
1. Record a new current living situation for each contact with the client.





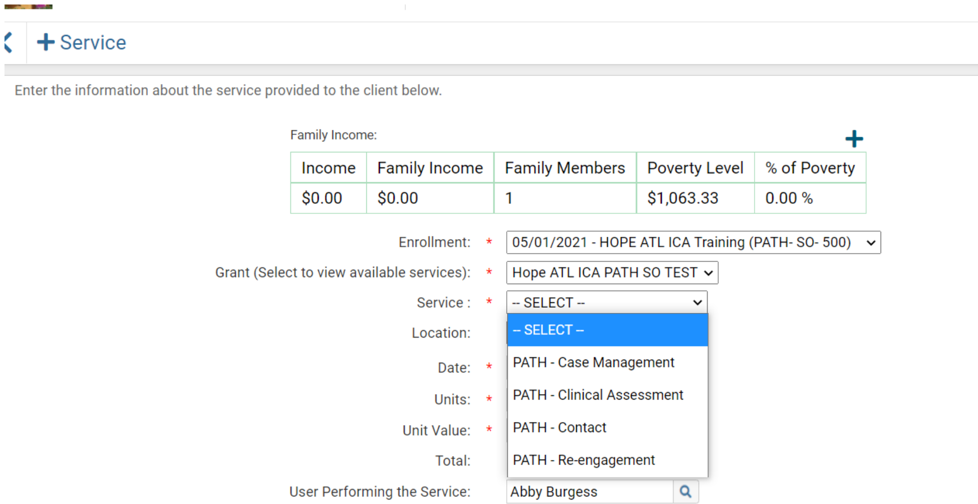
Services

1. Under Enrollment and Services, select Services



2. Select "Add New" to record a service.

A new service should be recorded for each instance of service. PATH funded services should only be recorded on active and engaged clients.


+ Service

Enter the information about the service provided to the client below.

Family Income:

Income	Family Income	Family Members	Poverty Level	% of Poverty
$0.00	$0.00	1	$1,063.33	0.00 %

Enrollment: * 05/01/2021 - HOPE ATL ICA Training (PATH- SO- 500)

Grant (Select to view available services): * Hope ATL ICA PATH SO TEST

Service : * -- SELECT --

-- SELECT --
PATH - Case Management
PATH - Clinical Assessment
PATH - Contact
PATH - Re-engagement

Location:

Date: *

Units: *

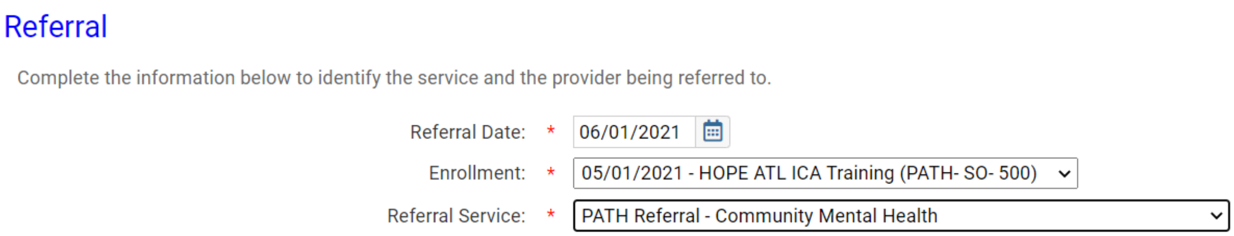
Unit Value: *

Total:

User Performing the Service: Abby Burgess

Referrals

1. Add PATH Referrals as appropriate to active and engaged clients.


Referral

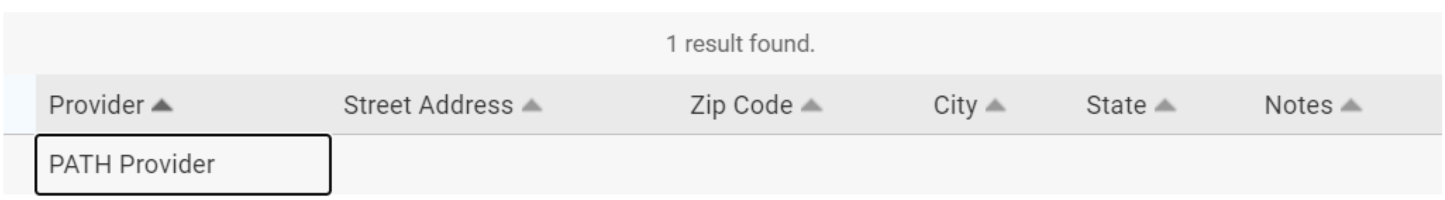
Complete the information below to identify the service and the provider being referred to.

Referral Date: * 06/01/2021

Enrollment: * 05/01/2021 - HOPE ATL ICA Training (PATH- SO- 500)

Referral Service: * PATH Referral - Community Mental Health

2. Choose “PATH Provider” for the required referral provider.

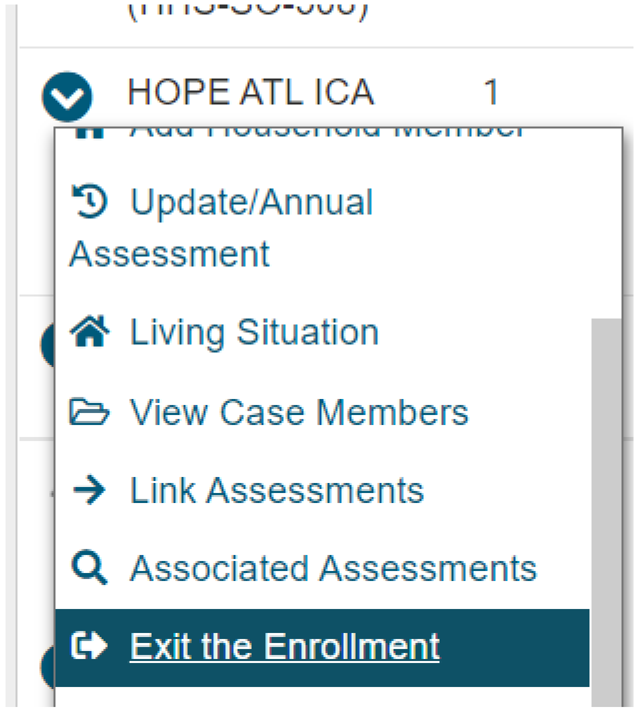

1 result found.

Provider	Street Address	Zip Code	City	State	Notes
PATH Provider					

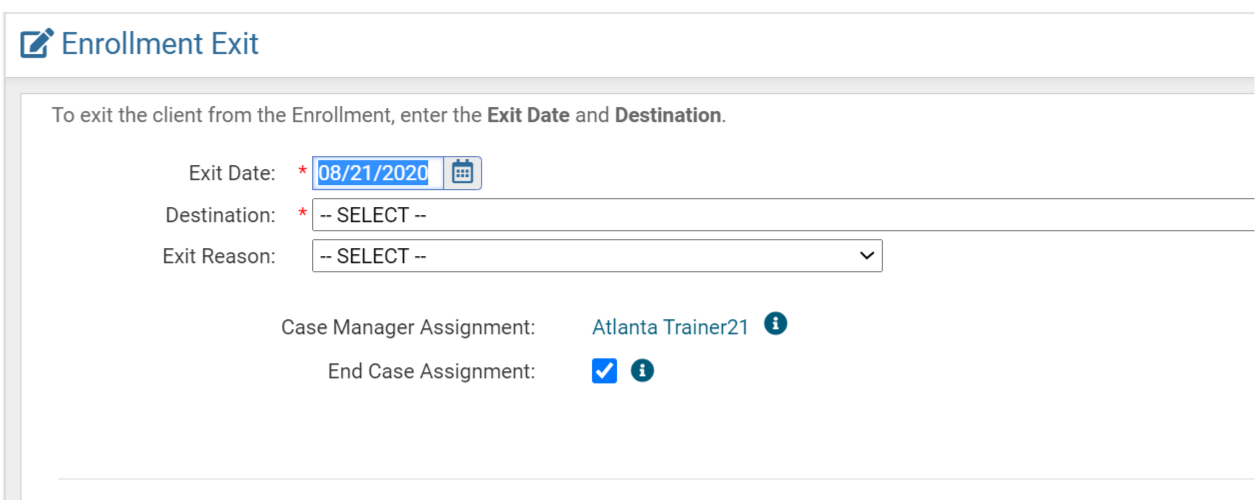
3. The referral status should be marked as Referral Made. Under the Referral Outcome section, update the referral to “Service Provided” after confirming that the PATH client successfully “attained” / connected to services with the referral source.

Project Exit

1. From the Clients Workspace, search for the existing client file. From the Project Enrollment, select "Exit the Enrollment."



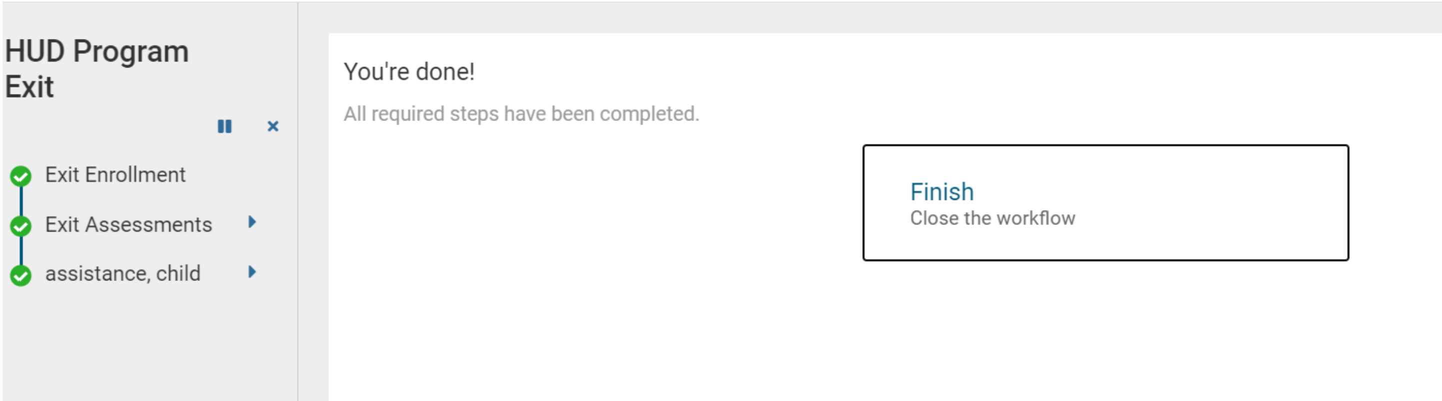
2. Complete the Exit Date and the Destination.



3. Complete the health insurance, disabling conditions, income and non-cash benefits questions. The default last status button is helpful in the exit workflow if no changes have been reported! You do not need to report expenses at exit.

4. For households, you will be prompted to exit members.

5. Exit Workflow is complete!

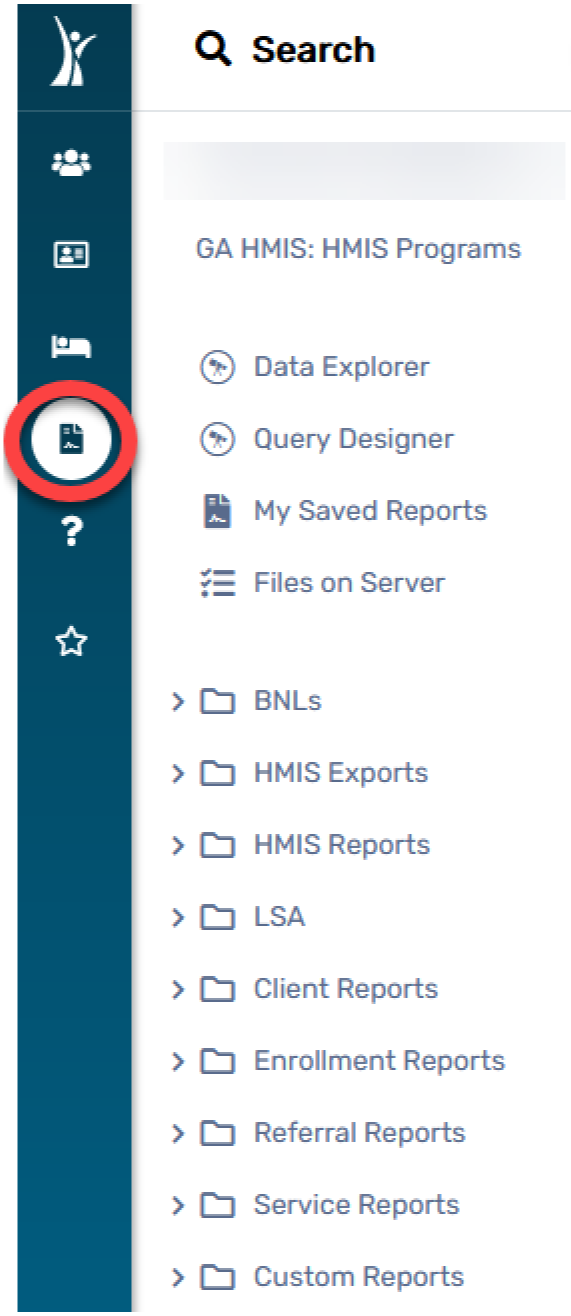


Auto Exit – Special Circumstances

PATH Projects are configured to Auto -Exit clients after 90 days with no contact or service in the record. When clients are auto exited without a service after the project start date, the exit date will match the project start date. Additionally, the auto exit does not populate exit assessment data.

Reporting

ClientTrack has a variety of canned reports to review data. Reports are in the report workspace. A few recommended reports are listed below.



- PATH Annual Report (see separate guide for PATH Reporting)
- HMIS Active Client List (Enrollment dates and intake details)
- Referrals
- Custom Reports (TBD)