

# HMIS Data Entry Quick Guide – PATH - Full Intake

Updated 6/1/2021

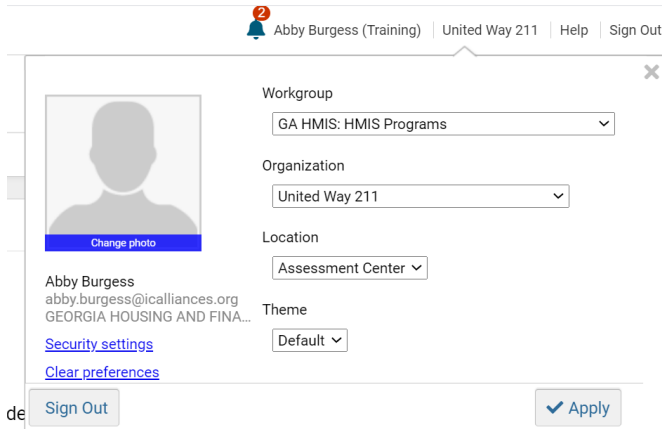
## Contents

HMIS Data Entry Quick Guide – PATH - Full Intake.....	1
PATH Workflow (Services Only and Street Outreach) .....	2
Login.....	2
Enrolling a client into a PATH Project in HMIS.....	2
1. Find Client .....	2
2. Review the Client Dashboard for existing enrollments. ....	3
Enrollment Workflow.....	3
3. Launch “Project Intake” .....	3
4. If you already searched, use the current client. ....	4
5. Add new client as needed.....	4
6. Enter the Basic Client Information and Basic Client Demographics .....	4
7. Add Contact information for the family.....	4
8. Complete the family information. Participant should be listed as Head of Household. Click Finish.....	4
9. Add family members to household as applicable. Save and close. ....	5
10. Complete the project enrollment and all workflow steps. ....	5
11. Complete the HMIS Universal Data Assessment. ....	7
12. Complete health insurance. Use “Default Last Insurance Status” button for existing clients. ....	7
13. Complete “SOAR Connection” assessment.....	7
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. ....	7
15. Complete the Domestic Violence Assessment (note conditional fields on this form) .....	8
16. Complete Income and Sources, Non-Cash Benefits.....	8
17. Complete the “Current Living Situation” for the client. ....	9
18. For households, the required workflow will load for each client. ....	10
19. Enrollment Workflow is complete! .....	10
Current Living Situation .....	10
Services .....	11
Referrals.....	12
Project Exit .....	13
Auto Exit – Special Circumstances .....	14
Reporting.....	14

## PATH Workflow (Services Only and Street Outreach)

### Login

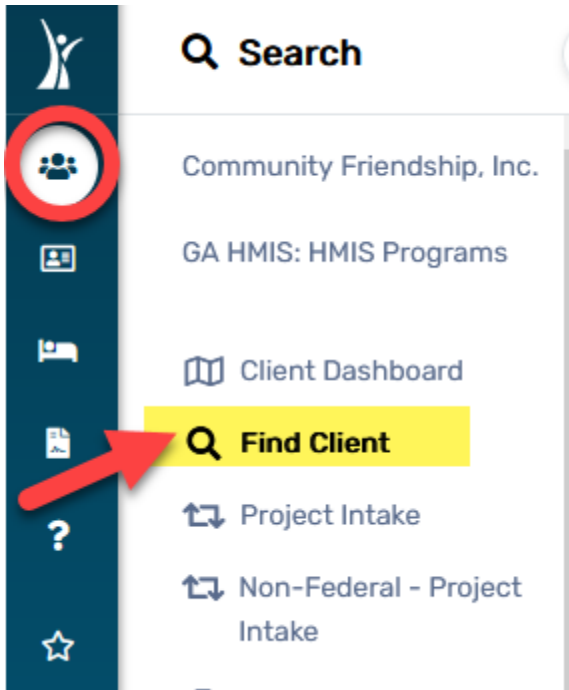
Users will login to GAHMIS: HMIS Programs workgroup under their Home or “funded” Organization



### 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”

### Intake (2298)

- Add or Edit
- Basic Client Information
- Family Members
- Program Enrollment

#### ?

### Add or Edit

Do you want to add a new client or use the selected client?

- + Add a new client
- ✎ Use the current client
- 🔍 Select another client

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

**Intake (2298)**

**+ Client Information**

Search Existing Clients Basic Client Information

**Basic Client Information**

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields allow users to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate the reason full information wasn't collected.

First Name: \*

Last Name: \*

Middle Name:

Suffix:

Name Quality: \*

Social Security Number: \*  i

SSN Quality:  Full SSN  
 Approximate or partial SSN reported  
 Client doesn't know  
 Client Refused  
 Data not collected

Veteran Status: \*  i

Show Address and Contact Information:  i

- Add Contact information for the family.

**Contact Information**

Address:

Address 2:

City, State, Zip Code:

Email:

Home Phone:

Work Phone:

Msg Phone:

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

## Family Information

Use this section to collect data about a client's family. The Family search field allows you to search for and select an existing family account. This is appropriate when adding a family member to an existing family.

Family:  i  
 Relationship to Head of Household: \*

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

This workflow will allow you to enroll all family members or select which family members you want to enroll.

Add a record

1 result found (+1).

<input type="checkbox"/>	First Name ▲	Middle Name ▲	Last Name ▲	Suffix ▲	Name Quality* ▲	Birth Date* ▲	Age	Birth Date Quality* ▲
<input checked="" type="checkbox"/>	Utility		Payment	<input type="text"/>	Full name reported ▼		N/A	Data not collected
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	--SELECT-- ▼	<input type="text"/>	N/A	--SELECT--

### 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.

Intake (2298) HUD Program Enrollment

Household

*Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."*

Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*	Date of Engagement	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH
05/26/2021		Abby Burgess	Self	05/26/2021	05/26/2021	Yes	

### 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. <b>DO NOT ENTER A DATE OF ENGAGEMENT UNLESS YOU HAVE THE COMMITMENT FROM THE CLIENT TO PARTICIPATE...</b> 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 <b>PATH funded services/ referrals added to records.</b>
Reason not enrolled in PATH	Dependent field, complete only if client became enrolled in PATH = No. Response options: <div style="background-color: #007bff; color: white; padding: 2px; margin-bottom: 5px;">Client was found ineligible for PATH</div> 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.

### Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Default Last Insurance Status

Covered by Health Insurance: \* Data Not Collected ▾

<input checked="" type="checkbox"/> Type ▲	Status ▲	Reason No ⓘ ▲	Other Coverage ▲	Wellcare Member ID
Private	No ▾	-- SELECT -- ▾		↻
Private - Employer	No ▾	-- SELECT -- ▾		↻
Private - Individual	No ▾	-- SELECT -- ▾		↻

13. Complete “SOAR Connection” assessment.

#### Intake (2298)

- Basic Client Information
- Family Members
- Program Enrollment
- Bear, Masha ▾
- Universal Data Assessment
- Connection with SOAR

#### SOAR Connection

Indicate the **Connection with SOAR** for the client below

Default Client's Last Assessment ⓘ

Assessment Active

Assessment Date: \* 05/26/2021 📅

Connection with SOAR: \* Yes ▾

Restriction: \*  Restrict to Organization ⓘ  Restrict to MOU/InfoRelease

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.

Intake (2298) Barriers

Identified Date: 05/26/2021  
Disabling Condition: Yes

Barrier	Help	Barrier Present?	Condition is indefinite and substantially impairs ability to live independently	Explanation	Previous Barrier Details
Alcohol Abuse	?	Yes	Yes		Previous Barrier
Chronic Health Condition	?	No			Previous Barrier
Developmental Disability	?	No			Previous Barrier
Drug Abuse	?	No			Previous Barrier
HIV/AIDS	?	No			Previous Barrier
Mental Health	?	Yes	Yes		Previous Barrier

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

**+ Domestic Violence Assessment**

If the client has been a victim of domestic violence, select Yes for Domestic Violence Experience, and select when the experi

Default Client's Last Assessment ⓘ

Assessment Active

Assessment Date: 08/21/2020

Domestic Violence Experience:

- Yes
- No
- Client doesn't know
- Client refused
- Data Not Collected

Restriction:

- Restrict to Organization ⓘ
- Restrict to MOU/Info Release

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.

Assessment Date: 02/25/2020

Income from Any Source: Yes

Non-Cash Benefits from Any Source: Yes

Expenses: -- SELECT -- ⓘ



### Income

<input type="checkbox"/>	Type ▲	Description ▲	Monthly Amount ▲	Restriction ?* ▲
<input type="checkbox"/>	Earned Income (i.e., employment income)	<input type="text"/>	<input type="text"/>	Restrict to Organization ▼
<input type="checkbox"/>	Unemployment Insurance	<input type="text"/>	<input type="text"/>	Restrict to Organization ▼
<input type="checkbox"/>	Supplemental Security Income (SSI)	<input type="text"/>	<input type="text"/>	Restrict to Organization ▼
<input type="checkbox"/>	Social Security Disability Insurance (SSDI)	<input type="text"/>	<input type="text"/>	Restrict to Organization ▼

### 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.

### + Current Living Situation

#### Current Living Situation Information

Current Living Situation: \*

Location Detail:

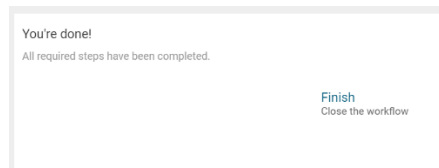
Record Contact:

#### Contact Service Information

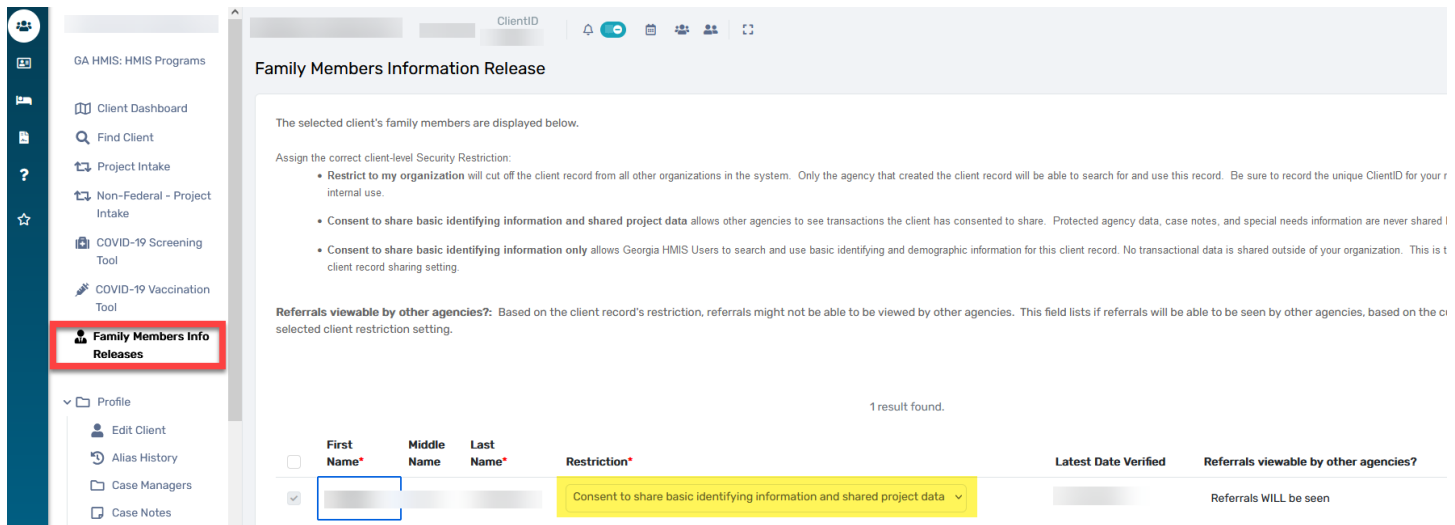
Contact Service: \*

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.

## Client is Sharing Demographics and Transactional Data

### Current Living Situation

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

Q Search

Profile

- Edit Client
- Alias History
- Case Managers
- Case Notes
- Client Files
- Information Release
- Paused Workflows
- Interested Others
- Document Check
- Current Living Situation**
- Notifications
- Photo
- Veteran Information

Current Living Situation

All of the client's current living situation history is displayed in the list below. To view or edit one, click **Edit Current Living Situation** to the left of the record you would like to change. If you want to add an item, click the **Add New Current Living Situation** button at the top of the screen.

+ Add New Current Living Situation

3 results found.

Information Date	Enrollment	Current Living Situation
------------------	------------	--------------------------

## Services

1. Under Enrollment and Services, select Services

+ Add New Service   Quick Services   + Add CE Event

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.

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) v

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

Service: \* -- SELECT -- v

Location: \* -- SELECT -- v

Date: \* PATH - Case Management

Units: \* PATH - Clinical Assessment

Unit Value: \* PATH - Contact

Total: \* PATH - Re-engagement

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) v

Referral Service: \* PATH Referral - Community Mental Health v

2. Choose "PATH Provider" for the required referral provider.

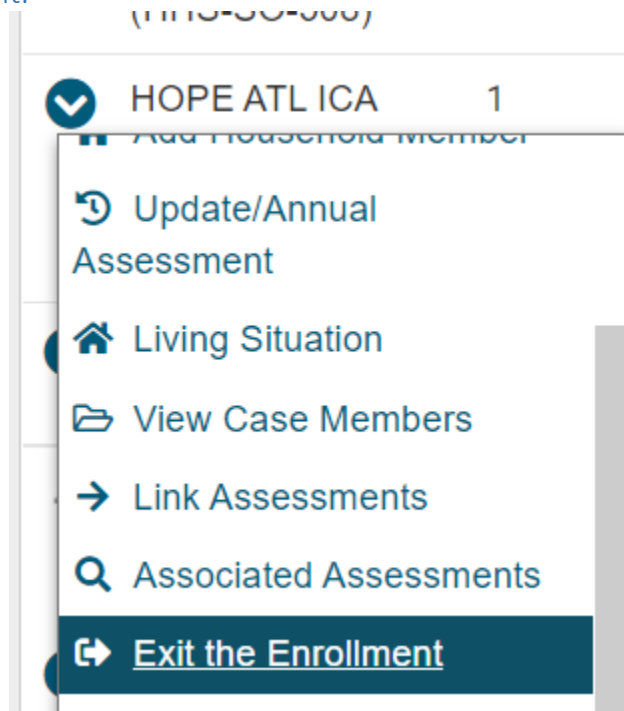
1 result found.

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.

Enrollment Exit

To exit the client from the Enrollment, enter the **Exit Date** and **Destination**.

Exit Date: \*

Destination: \* -- SELECT --

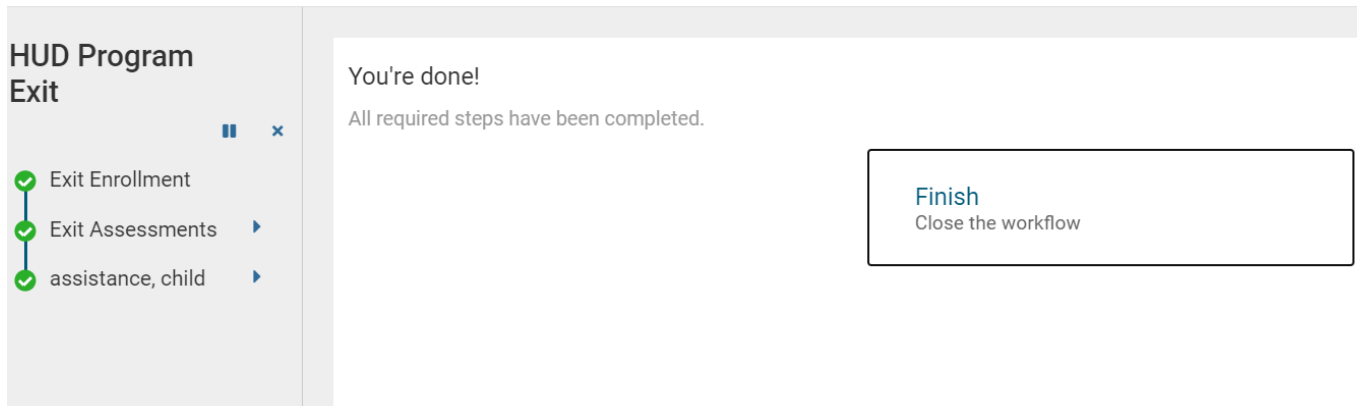
Exit Reason: -- SELECT --

Case Manager Assignment: Atlanta Trainer21

End Case Assignment:

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!

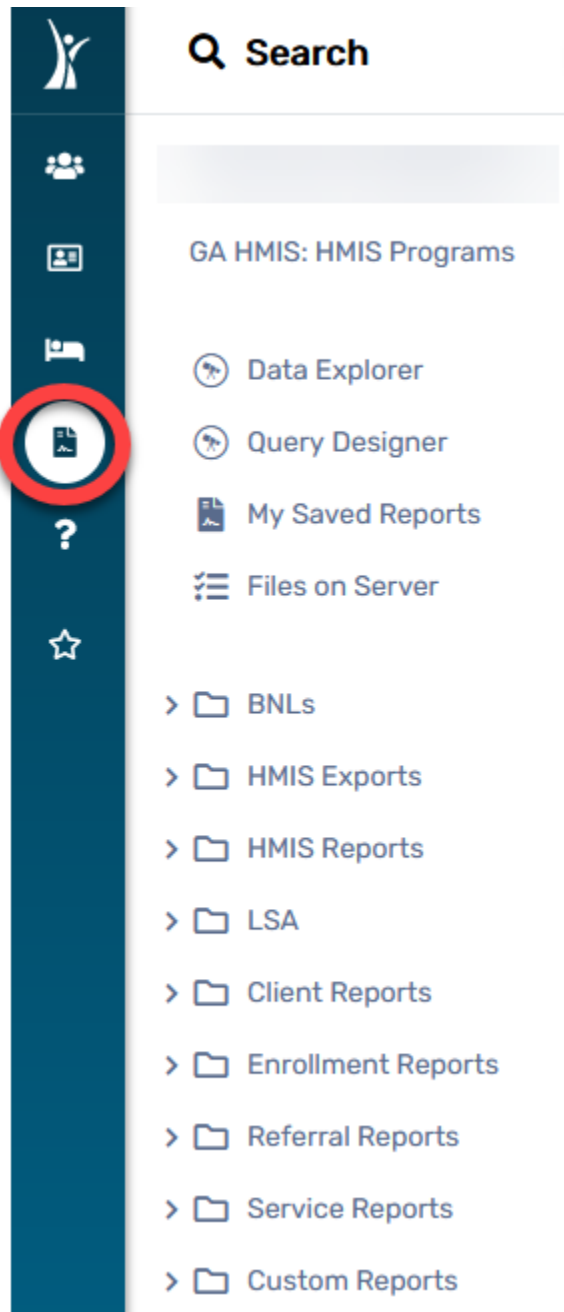


## Auto Exit – Special Circumstances

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)