



**Bowman Systems**  
Software and Data Support for Human Services

# **WORKFLOW FOR PATH PROJECTS**

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## TERMS

**Contact** - this is an interaction between a worker and a client. These can be verbal conversations between the worker and client or a referral to a service. Contacts are recorded each and every time a client has an interaction with an outreach worker.

**Date of Engagement** – this is the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.

**PATH Status** – this is element that demonstrates whether the client has consented to participate in services provided by the PATH project and on which date this occurred. If marked Yes, this is the PATH Enrollment Date.

## BACKGROUND

The PATH project workflow starts with the outreach worker meeting with a potential client one or more times prior to engaging and potentially enrolling the client in the PATH project. ServicePoint™ provides the following fields to track that data:

- 1) **Outreach** sub-assessment
  - a. This sub-assessment is used to record each Contact with the client.
  - b. It contains entries for the Date of Contact and Time (Time optional), Start Date, Location, and End Date (End Date optional)
  - c. The date of the first Contact is the same as the Entry/Exit start date.
- 2) **Date of Engagement**
  - a. This is the date that the client agreed to engage in the service offering.
  - b. There should only be one Date of Engagement per project stay and this is recorded as the date that the engagement occurs.
  - c. For PATH projects only, the Date of Engagement must occur on or before the date of enrollment
  - d. If the client does not become engaged, no date needs to be recorded
  - e. The Date of Engagement “stops” the count of Contacts for a given client.
- 3) **PATH Status**
  - a. This is a Yes/No question which indicates whether the client has enrolled in the PATH Project.
  - b. If the client has consented to participate in services provided by the PATH project, then the PATH Status is answered Yes and the appropriate Enrollment Date should be recorded.
  - c. If a client is not enrolled in PATH then the PATH Status is answered No and the date of the non-enrollment and reason should be recorded.

Following the recommended workflow will ensure that data are entered properly into the ServicePoint for reporting purposes and that users are compliant with the requirements outlined in the HMIS Data Dictionary v3

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## PROVIDER CONFIGURATION

A separate provider should be created for each PATH project. The PATH provider should be used exclusively for recording the Contacts (using Outreach sub-assessment), Date of Engagement, Services and Referrals provided by the project for all clients.

### **Required HUD Standards Information tab settings are as follows:**

- Record appropriate HUD Standards information for the project.
- In order to pull into the PATH report the provider must have a Project Type of either “Street Outreach (HUD)” or “Services Only (HUD)” as per the grant agreement with SAMHSA.
- Provider Grant Type must be set to “PATH” to ensure that the appropriate data entry settings are applied to Services and Referrals.

### **Recommended Services tab settings are listed as follows:**

- Service Setting > Service Quick List – set up service codes as per Appendix A: Services Crosswalk. The service codes do not populate into the PATH report, only the PATH Service Type (picklist value) is reported. Service codes can be as specific or generic as desired, based on the additional reporting needs of the community.

### **Required ClientPoint Module Settings as follows:**

- Entry/Exit Settings > Use Entry/Exit Interim and Follow Up Reviews – this setting must be checked in order to appropriately display assessments and record Update information.

### **Recommended Assessment Display tab settings are listed as follows:**

- Failure to display the appropriate Assessment could result in missing data for the PATH report
  - PATH Entry should be set to HHS PATH Entry
    - Date of Engagement may be added to the Entry Assessment if desired.
  - PATH Interim Review should be set to either HHS PATH Entry or HHS PATH Update; ideally, show multiple assessments so that Entry information can be updated as the User gathers more client information
  - PATH Exit should be set to HHS PATH Exit

### **Required User Access levels:**

- Referrals are created and tracked using the “Provider Creating” for the referral.
- Users must either enter Referral data using EDA mode (EDA to the PATH Provider) or the user must be assigned to the PATH provider.
- Only the PATH Referral Type (picklist value) populates into the PATH report.

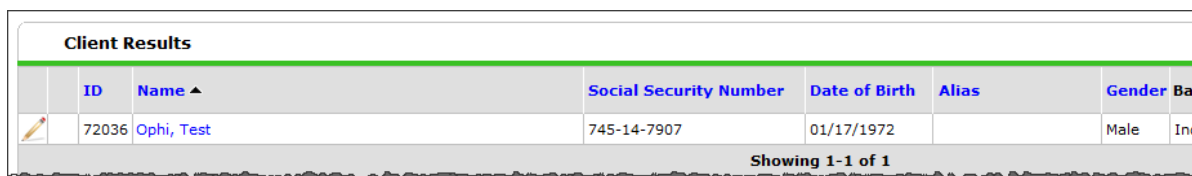
## SERVICEPOINT® WORKFLOW

### Initial Meeting with Client

This is the initial point of Contact with the client. In essence it involves capturing the information about the client’s demographics and number of contacts with the client before Engagement and finally formal enrollment in the PATH.

### Step One: Create Client Profile

First, search for the client by name or alias before creating a new client record. If client is already in the system click on the pencil next to the client’s name to go into client’s record or create a new record if needed (Figure 1). From this point either follow Step Two to obtain and record an ROI or proceed to Step Three to create a project Entry.



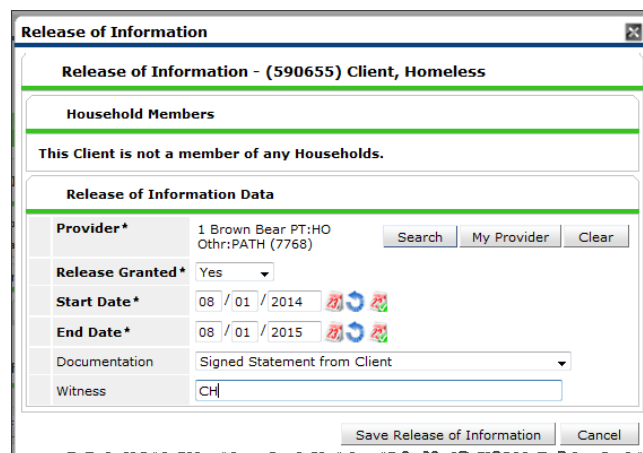
Client Results							
	ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Base
	72036	Ophi, Test	745-14-7907	01/17/1972		Male	In

Showing 1-1 of 1

Figure 1

### Step Two: Obtain and Record ROI (Optional)

Click on the ROI tab and click Add Release of Information to generate an ROI. Screen should look like below (Figure 2).



**Release of Information**

Release of Information - (590655) Client, Homeless

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**Household Members**

This Client is not a member of any Households.

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**Release of Information Data**

**Provider\*** 1 Brown Bear PT:HO  
Othr:PATH (7768) Search My Provider Clear

**Release Granted\*** Yes

**Start Date\*** 08 / 01 / 2014

**End Date\*** 08 / 01 / 2015

**Documentation** Signed Statement from Client

**Witness** CH

Save Release of Information Cancel

Figure 2

## Step Three: Create Project Entry and update HHS PATH Entry Assessment

Create an Entry/Exit record for the client using the PATH Entry/Exit Type. This record should have the same Entry/Exit Start Date as the date of the first Contact Recorded in the Outreach Sub-assessment (Figure 3.1).

Figure 3.1

Next, the user should record the first client Contact in the Outreach Sub-assessment, ensuring that Date of Contact is the same as Project Entry Date. Then enter all known data elements found on the HHS PATH Entry Assessment (Figure 3.2).

Figure 3.2

*NOTE: Income and Sources, Non-Cash Benefits, Health Insurance and Disability Type of HIV/AIDS are pending HHS approval at time of publication of this document (9/5/14). Collection of these items is at the discretion of the PATH grantee.*

## ***Update client's information as relationship develops***

As the Outreach Worker's relationship with the client develops, the user can update the client's profile with data elements as they become available. Include all Contacts with the client in this process. Contacts should be recorded up until the point the client becomes Engaged with the Outreach Worker.

### **Step Four: Create an "Update" using Interim Reviews**

The user will need to update items using the Interim Review functionality available on the Entry/Exit tab (complete workflow found on Collaborango in the Documents and Downloads > Training > Training 5.x folder).

Clicking on "Add Interim Review" will take the user to the Interim Review Data Screen. The user will see the Entry/Exit Provider and Entry/Exit Type as selected when the initial Entry/Exit was created. The user should then select the Interim Review Type labeled Update and enter the desired Review Date (Figure 4). Clicking Save and Exit will take the user to the HHS PATH Update Assessment.

The user should add additional Contacts using the Outreach Sub-assessment, and update other data elements as required. Finally, the user should click Save and Exit to complete the Update.

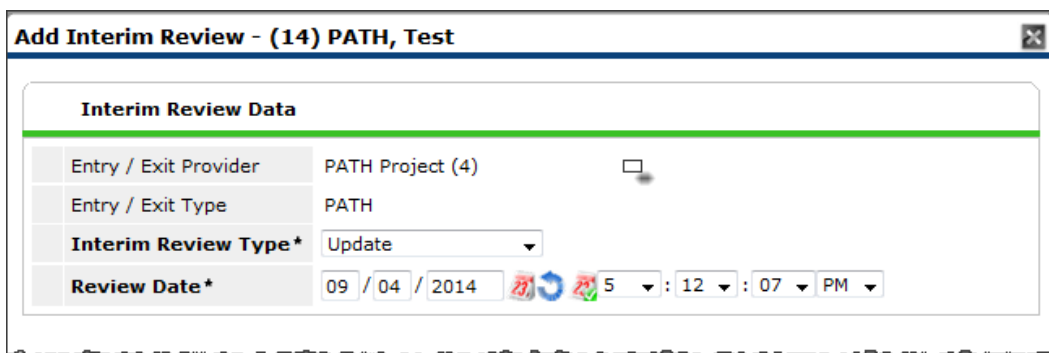


Figure 4

#### **.IMPORTANT**

At this point the user should do the following:

- 1) Repeat **Step 4** using Interim Review Type of Update to record additional Contacts with the client for every Contact after the initial contact. This process should continue until the client reaches the Engagement Stage.
- 2) Once the client is Engaged with the Outreach Worker, enter a Date of Engagement using the Interim Review Type of Update and continue to **Step 5**.

## Determine Enrollment Status (PATH Status) of client

Overtime, the Outreach Worker and client will develop a relationship that leads to Engagement. Once a client has formally agreed to accept PATH services, the client record should be updated to note this in the PATH Status. Note: The Date of Engagement must be on or before the date the client is enrolled in PATH (PATH Status = Yes).

### Step Five: Create an “Update” to record PATH Status

If the client enrolls in the PATH Project, fill in the appropriate information in the PATH Status portion of the HHS PATH Update Assessment (Figure 5). Then proceed to Steps Six (a) and (b) to record services and referrals.

If the client does not enroll in the PATH Project, fill in the appropriate information in the PATH Status portion of the HHS PATH Update Assessment and Proceed to Step Seven to Exit the client from the PATH Project.

The screenshot shows the 'Outreach' interface. At the top, there is a search icon and the title 'Outreach'. Below this is a table with three columns: 'Date of Contact', 'Start Date\*', and 'Location'. The table contains three rows of data:

Date of Contact	Start Date*	Location
08/15/2014 12:00:00 PM	08/15/2014	Place not meant for habitation
08/01/2014 12:00:00 PM	08/01/2014	Place not meant for habitation
09/04/2014 12:00:00 PM	09/04/2014	Service setting, non-residential

Below the table is an 'Add' button and a status indicator 'Showing 1-3 of 3'. Underneath is a form for updating the PATH status with the following fields:

- Date of Engagement: 09 / 04 / 2014
- Date of PATH Status Determination: 09 / 16 / 2014
- Client Became Enrolled in PATH: Yes
- If no, reason not enrolled: -Select-

Figure 5



## ***Provide and document Services and Referrals for the client***

All PATH funded services and referrals must be documented for the client.

### **Step Six (a): Create Service Transactions**

PATH funded services should be recorded for each client. These should be entered any time after the client is enrolled in the PATH project.

On the **Service Transactions** tab select **Add a Service** to access the service transaction screen. Be sure the PATH provider is selected. Enter a **Start Date** for the Service and select the type of service from the dropdown picklist or use the look-up function. Then select the appropriate **Type of PATH Funded Service** from the dropdown picklist (Figure 6a). This process should be repeated with each PATH provided service.

**Household Members**

**This Client is not a member of any Households.**

<b>Service Provider *</b>	PATH Project (4)
Creating User	Candice Hacker
<b>Start Date *</b>	09 / 05 / 2014    2 : 59 : 36 PM
End Date	09 / 05 / 2014    2 : 59 : 47 PM
<b>Service Type *</b>	Case/Care Management (PH-1000)
Provider Specific Service	-Select-
Service Notes	<div style="border: 1px solid gray; height: 100px;"></div>

**Type of PATH FUNDED Service Provided** Case management

**Figure 6a**

## Step Six (b): Create Referrals

All referrals from the PATH provider to other entities should be recorded in ServicePoint. These should be entered any time after the client is enrolled in the PATH project.

On the **Service Transactions** tab select **Add Referrals** to access the referrals screen. Select the need assignment from the Service Code Quicklist or use the Look-Up function. Select a provider from the Referral Provider Quicklist (if pre-populated on Provider Admin).

In the Referral Data section enter a **Needs Referral Date** for the Referral and select the appropriate **Type of PATH Referral** from the dropdown picklist (Figure 6b). If the Referral Outcome is known in advance, enter it now. Otherwise, the outcome can be updated at a later date. This process should be repeated with each referral made by the PATH provider.

Referrals		
Referred-To Provider	Job Training Formats	Referred Clients
Project Provider (3)	<input checked="" type="checkbox"/>	(13) Client, Test

Figure 6b

## ***Client Exit from the Project***

An exit is created once the client is either not enrolled in the PATH project or once the client is housed or declines further services. Clients who are Contacted, Contacted and Engaged but never have a PATH Status determined may need an exit from the project after some determined amount of non-contact.

### **Step Seven: Create the exit record**

Enter appropriate Reason for Leaving and Destination information, and Save and Continue to proceed to the HHS PATH Exit Assessment. Complete all required updates and elements. Be sure to check sub-assessment records for valid types/dates.

## **WORKFLOW CHECK LIST**

- ✓ Create client profile, if client doesn't already exist in system
- ✓ Obtain and record ROI (Optional)
- ✓ Record Project Entry Date with the same date as the First Date of Contact. Record all known data elements at project entry
- ✓ Record subsequent contacts with client via Interim Review Type of Update; add in additional data elements as they become available. Record final contact and Date of Engagement on the same date
- ✓ Record PATH Status, if known
- ✓ Record services and referrals, if applicable
- ✓ Record Project Exit.

## **REPORTING**

### ***Required Report for PATH funded Projects***

The PATH report is a “canned” report that is available on the Reports tab in the Provider Reports section. For more information please see the PATH Tech Note found on Collaborango (located in the ServicePoint > Reporting > PATH folder).

## APPENDIX A: 4.14A – Services Provided – PATH Funded

The PATH Program requires that all PATH funded services are recorded for each client.

Type of PATH Funded Service Provided	Service Description	Service Code
Outreach	Street outreach programs	PH-8000
	Outreach programs	TJ-6500.6300
Screening/Assessment	Mental Health Evaluation	RP-5000 and 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 Technical Assistance	**	**
Security Deposits	Rental deposit assistance	BH-3800-7250
One-time Rent for Eviction Prevention	Rent payment assistance	BH-3800.7000
Other PATH Funded Services	All other services	Various

\*\* HUD/SAMSHA are unable to provide a description of services at this time.

## APPENDIX B: 4.16A – Referrals Provided – PATH

The Referrals Provided data element is required for both PATH Street Outreach and PATH Services Only projects. For each PATH referral users will have to record the Date of Referral, Type of Referral, select a “matching” service, and choose an outcome for each referral. Outcome picklist values = Attained, Not Attained, Unknown.

Type of Referral	Service 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 abuse services	RX and related
Primary Health Services	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
Relevant Housing Services	**	**
Housing Placement Assistance	Housing search and Information	BH-3900
	Supportive housing placement/referral	BH-8500
Income Assistance	Basic income maintenance	NL-1000
	Homeless financial assistance programs	NL-1000.3000
Employment Assistance	Employment	ND
Medical Assistance	Medicaid	NL-5000.5000 and related

\*\* SAMSHA has not yet provided a description of this referral type at this time.