

# **SERVICEPOINT WORKFLOW FOR PATH PROJECTS**

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Mediware Information Systems  
Housing and Community Services  
333 Texas Street, Suite 300  
Shreveport, LA 71101  
Corporate: (888) MEDIWARE  
Toll Free: (844) 213-8780  
Direct: (318) 213-8780  
Fax: (318) 213-8784  
<http://www.mediware.com>

## Table of Contents

<b>TERMS &amp; ASSOCIATED SERVICEPOINT FIELDS .....</b>	<b>3</b>
<b>CONTACT .....</b>	<b>3</b>
Outreach sub-assessment.....	3
<b>ENGAGEMENT .....</b>	<b>3</b>
Date of Engagement .....	3
<b>PATH ENROLLMENT (STATUS) .....</b>	<b>3</b>
Client Became Enrolled in PATH = Date of Path Status Determination .....	3
If no, reason not enrolled.....	4
<b>REENGAGEMENT .....</b>	<b>4</b>
<b>PROVIDER CONFIGURATION.....</b>	<b>4</b>
<b>REQUIRED HUD STANDARDS INFORMATION TAB SETTINGS ARE AS FOLLOWS: .....</b>	<b>4</b>
<b>RECOMMENDED SERVICES TAB SETTINGS ARE LISTED AS FOLLOWS:.....</b>	<b>4</b>
<b>REQUIRED CLIENTPOINT MODULE SETTINGS AS FOLLOWS: .....</b>	<b>4</b>
<b>RECOMMENDED ASSESSMENT DISPLAY TAB SETTINGS ARE LISTED AS FOLLOWS:.....</b>	<b>5</b>
<b>REFERRALS: .....</b>	<b>5</b>
<b>SERVICEPOINT® WORKFLOW.....</b>	<b>6</b>
<b>INITIAL MEETING WITH CLIENT.....</b>	<b>6</b>
Step One: Create Client Profile .....	6
Step Two: Obtain and Record ROI (Optional).....	6
Step Three: Create Project Entry and update HHS PATH Entry Assessment.....	7
<b>ADD TO CLIENT’S INFORMATION AS RELATIONSHIP DEVELOPS .....</b>	<b>8</b>
Step Four: Create an “Update” using Interim Reviews.....	8
<b>DETERMINE ENROLLMENT STATUS (PATH STATUS) OF CLIENT .....</b>	<b>10</b>
Step Five: Create an “Update” to record PATH Status .....	10
<b>PROVIDE AND DOCUMENT SERVICES AND REFERRALS FOR THE CLIENT .....</b>	<b>10</b>
Step Six (a): Create Service Transactions.....	10
Step Six (b): Create Referrals.....	11
<b>CLIENT EXIT FROM THE PROJECT .....</b>	<b>12</b>
Step Seven: Create the exit record.....	12
<b>WORKFLOW CHECK LIST .....</b>	<b>12</b>
<b>REPORTING .....</b>	<b>13</b>
<b>REQUIRED REPORT FOR PATH FUNDED PROJECTS .....</b>	<b>13</b>
<b>APPENDIX A: 4.14A – SERVICES PROVIDED – PATH FUNDED.....</b>	<b>14</b>
<b>APPENDIX B: 4.16A – REFERRALS PROVIDED – PATH.....</b>	<b>15</b>
<b>VERSION HISTORY .....</b>	<b>15</b>

## TERMS & ASSOCIATED SERVICEPOINT FIELDS

**Contact** - this is an interaction between a worker and a client who is potentially PATH eligible or enrolled in PATH. These can be verbal conversations between the worker and client or a referral to a service. Upon initial contact with the client an entry should be created. Contacts are recorded via the outreach sub-assessment each and every time a client has an interaction with an outreach worker.

### *Outreach sub-assessment*

- This sub-assessment is used to record each Contact with the client.
- It contains entries for the Date of Contact and Time (Time optional), Start Date, information about whether the client is on the Streets-ES-SH, and End Date (End Date optional).
- The date of the first Contact is the same as the Entry/Exit start date.
- Contacts are recorded throughout the entire Project Stay from Start to Exit.
- If a client is not contacted after x days pass, the client should be exited from the project. (X in determined in conjunction with the State PATH Contact.

**Engagement** - this is the point at which an interactive client relationship results in a deliberate client assessment or beginning of a case plan. This is a one-time event that may occur on or after the project Start date and before PATH enrollment and project exit. Captured in Date of Engagement field on HHS PATH Entry or Update assessments.

### *Date of Engagement*

- This is the date that the client agreed to engage in the service offering.
- There should only be one Date of Engagement per project stay and this is recorded as the date that the engagement occurs.
- For PATH projects only, the Date of Engagement must occur on or before the date of enrollment.
- If the client does not become engaged, no date needs to be recorded.
- Data quality for PATH clients does not begin until there is a recorded date of engagement.
- Date of Engagement must be on or before the Date of PATH Status Determination and may be the same date as the date of the first contact/project Start.

**PATH Enrollment (Status)** - 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. Captured in Date of PATH Status Determination and Client Became Enrolled in PATH assessment questions on HHS PATH Entry or Update assessments.

### *Client Became Enrolled in PATH = Date of Path Status Determination*

- This is a Yes/No question which indicates whether the client has enrolled in the PATH Project.
- 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 (Status) Date should be recorded.
- 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. The client should then be exited from PATH.

### *If no, reason not enrolled*

- If Client Became Enrolled in PATH is No this question should be completed.
- This is a picklist to notate why a client was not enrolled in PATH.

**Reengagement** – the process of reestablishing interaction with PATH-enrolled individuals who are disconnected from PATH services 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. A Reengagement (Street Outreach) service should be recorded to reflect that this has occurred.

## **PROVIDER CONFIGURATION**

A separate provider should be created for each PATH project – Street Outreach and Services Only. 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. Provider Uses HMIS must be checked to display the HUD Standards Information Tab.

### **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)”. Most communities will have both a Street Outreach and Services Only PATH Project set up for recording client data.
  - Street Outreach is where the client generally resides in a place not meant for human habitation prior to Project Start.
  - Services Only is where the client generally resides in a place meant for human habitation prior to Project Start. This could be shelter, doubled up or at risk of homelessness.
- **CONTINUUM Y/N** is set to Yes.
- **PROVIDER GRANT TYPE** must be set to “PATH” to ensure that the appropriate data entry settings are applied to Services and Referrals.
- Federal Funding Source and Grant ID should be added appropriately.
- **ADD COC CODE** with appropriate Start Date (End Date should be null).

### **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 check marked 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 for Street Outreach (2017) or HHS PATH Entry for Services Only (2017)
    - Date of Engagement may be added to the Entry Assessment if desired.
    - PATH Status questions may be added to the Entry Assessment if desired.
  - PATH Interim Review should be set to HHS PATH Update (2017); ideally, show multiple assessments would be marked so that the Annual Assessment (2017) can be filled in for clients enrolled for 365 days or longer.
  - PATH Exit should be set to HHS PATH Exit (2017)

### **Referrals:**

- Referrals are created and tracked using the "Provider Creating" for the referral.
- **Users must either enter Referral data using Enter Data As (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.
- Referrals made for Internally Provided services must be recorded with an outcome Identified.

#### **Elements required for collection:**

<b>Number</b>	<b>Element</b>	<b>Street Outreach</b>	<b>Services Only</b>
UDE	All Universal Data Elements	x	x
4.2	Income and Sources	x	x
4.3	Non-Cash Benefits	x	x
4.4	Health Insurance	x	x
4.5	Physical Disability	x	x
4.6	Developmental Disability	x	x
4.7	Chronic Health Condition	x	x
4.8	HIV/AIDS	Δ	Δ
4.9	Mental Health Problem	x	x
4.10	Substance Abuse	x	x
4.12	Contact	x	x
4.13	Date of Engagement	x	x
P1	Services Provided - PATH Funded	x	x
P2	Referrals Provided - PATH	x	x
P3	Path Status	x	x
P4	Connection with SOAR	x	x

More info about data collection and stages found in PATH HMIS manual.

<https://www.hudexchange.info/resources/documents/PATH-Program-HMIS-Manual.pdf>

## SERVICEPOINT® WORKFLOW

Following the recommended workflow will ensure that data is entered properly into the ServicePoint for reporting purposes and that users are compliant with the requirements outlined in the HMIS Data Dictionary v1.2.

### Initial Meeting with Client

This is the initial point of Contact with the client which involves capturing the information about the client’s demographic information. If unavailable, this information can be entered during the subsequent contacts with the client throughout the project stay from Start to exit and finally formal enrollment in the PATH. By the Date of Engagement, all the Entry Objects should be collected by editing the client record via the edit pencil on the Entry Assessment.


#### 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).

If required proceed to Step Two to obtain and record a Release of Information (ROI) or proceed to Step Three to create a project Entry.

Client name may be temporary if added before full name details are known. For example, Sheila Redhat may be used to identify the client until the client’s full name is known.



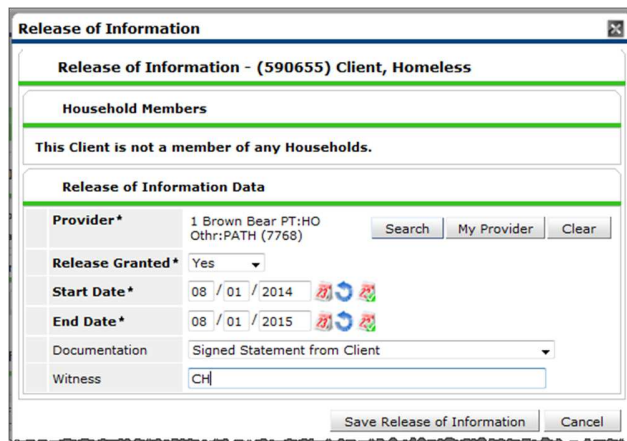
Client Results							
	ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Ra
	72036	Ophi, Test	745-14-7907	01/17/1972		Male	In

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. (Figure 2).



**Release of Information**

Release of Information - (590655) Client, Homeless

**Household Members**

This Client is not a member of any Households.

**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

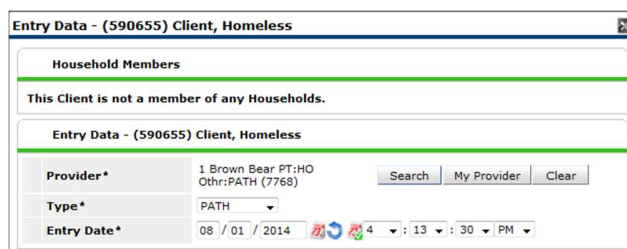
Create an Entry/Exit record for the client using the PATH Entry/Exit Type.

- Create an Entry into the Street Outreach project if the client generally resides in a place not meant for human habitation.
- Create an entry into Services Only project if the client generally resides in a place meant for human habitation.

**IMPORTANT**

- If the user is unable to provide the Case Manager with information about residence prior do not create the entry. Wait until the residence information can be obtained to create the entry record.
- If later it is determined that the client was entered into the wrong project you do NOT have to delete and start over or edit the project entry. It will not impact the report.

The Entry/Exit Start Date should be the same as the date of the first Contact Recorded in the Outreach Sub-assessment (Figure 3.1).



**Entry Data - (590655) Client, Homeless**

**Household Members**

This Client is not a member of any Households.

**Entry Data - (590655) Client, Homeless**

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

Type\* PATH

Entry Date\* 08 / 01 / 2014 4 : 13 : 30 PM

Figure 3.1

Continue to enter all known data elements found on the HHS PATH Entry Assessment (Figure 3.2) up to the date of engagement. This is done via the edit pencil on the Project Entry.

Contacts are recorded via the Outreach Sub-assessment using an Interim Review for "Update". More than one contact (with different dates) can be recorded on a single Update.

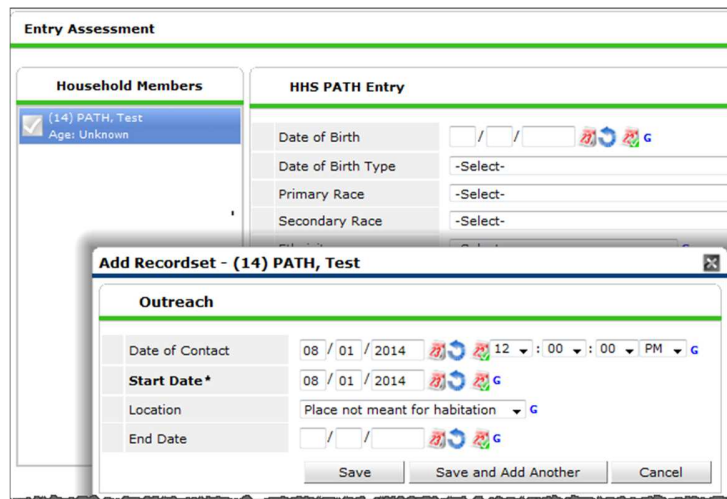


Figure 3.2

### **Add to 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. This should be done using the PENCIL for Entry (items required at Start).

### **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 for adding interim reviews 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.



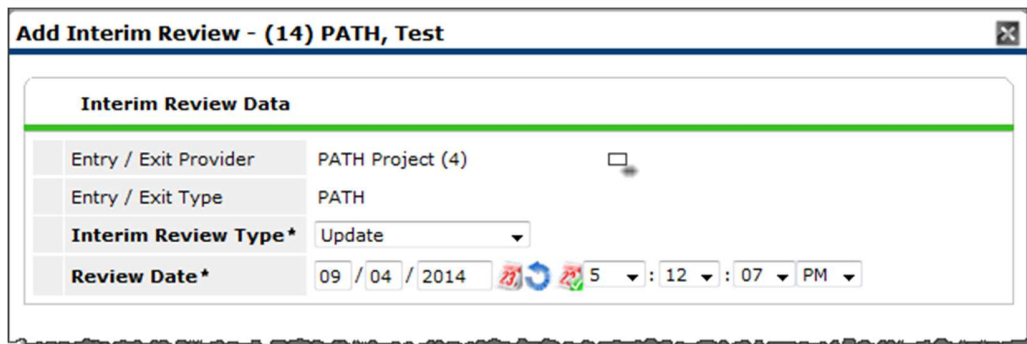


Figure 4

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.

### IMPORTANT

- The case manager should record every contact with the client by adding a row to the Outreach Sub-Assessment
- The case manager can create one interim review to record multiple contacts. i.e. the date of each contact can be on or before that interim review.

### REPEAT

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 should continue for the entire project stay from Start to Exit.
- 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**.
- 3) Continue to record Contacts throughout the entire Entry to Exit process. If a client goes x many days between contacts (X is determined in conjunction with the State PATH Contact) then the client should be exited from the project – proceed to Step 7.

### RECORD DATE OF ENGAGEMENT

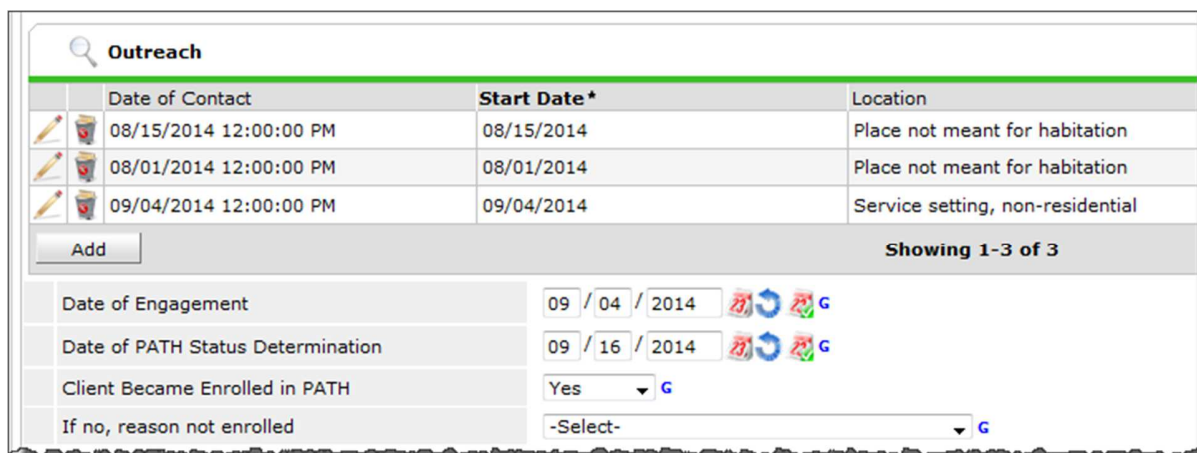
Once the client and Outreach Worker have reached the point of Engagement, the client has formally agreed to accept PATH services, the client record should be updated to note this in the Date of Engagement field. This date must be on or before the date the client is enrolled in PATH (PATH Status = Yes).




## Determine Enrollment Status (PATH Status) of client

### 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). Record a contact on this date. 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.




	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

**Add** **Showing 1-3 of 3**

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. Note that the PATH Annual Report will only count each service type once per client. (All referrals are counted).

### 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. (Services can be recorded before enrollment but will not count in the PATH Annual Report).

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. The report counts services based on the Path Funded Service picklist, not the AIRS code.

**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: 80px; width: 100%;"></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.

**REMINDER**

The user creating the referral must be at the PATH provider either by default or through Enter Data As mode.

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. The report counts referrals using the Type of PATH referral and not the AIRS code.

**Referral Outcome:**

- Attained – the client received services as a result of referral
- Not attained – referred but may not be connected to service
- Unknown – unknown to provider

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. Exits can also be completed when:

- Entered another project type
- Engaged with another outreach worker or project
- Achieved Stable or Permanent Housing
- Transitioned to Mainstream Resources
- Deceased
- Can't locate client (no further contacts)

**Step Seven: Create the exit record**

Click the edit icon under Exit Date beside the corresponding PATH entry. Enter the appropriate Reason for Leaving and Destination information, and Save and Continue to proceed to the HHS PATH Exit Assessment. Complete all required updates and data 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 Start Date with the same date as the First Date of Contact. Record all known data elements at project Start
- ✓ Record subsequent contacts from Start to Exit with client via Interim Review Type of Update; add in additional at Start for Start data elements as they become available. Update items are added via Interim Review.
- ✓ Record Date of Engagement
- ✓ 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).

Note: PATH requires data elements to be collected in HMIS that are not included in the PATH report. These elements are listed as follows:

Here are the unused items, collection required:

- Head of Household
- Client Location
- Destination
- Referrals for Job Training, Educational Services and Housing Services

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

The Services Provided data element is required for both PATH Street Outreach and PATH Services Only projects. Record service for Head of Household when a service benefits the whole household; Services recorded only for Heads of Households and Adults; Record once, the first time the service is provided. Client is enrolled. Encouraged to record all services provided; report only counts 1 time per service per client in the reporting period.

Type of PATH Funded Service 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 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 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

## 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. PATH referrals are encouraged to record all each time provided; report only counts 1 time per referral per client in the reporting period.

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/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
Temporary Housing	Transitional Housing/Shelter	BH-8600
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

## VERSION HISTORY

Date of Revision	Document Version #	Revision Notes
2017/06/19	V01	First Release of Document
2017/10/30	V02	Revision: Updated to reflect changes as required by the 2017 HMIS Data Dictionary v1.2.