NC HMIS HHS PATH Entry/Exit Workflow for ServicePoint

IMPORTANT PREREQUISTE NOTICE

This workflow requires that users have a FIRM understanding of the ClientPoint Module as well as basic ServicePoint functionality. Individuals who are either new to the system or are unfamiliar with any aspect of those things mentioned above MUST complete the appropriate prerequisite training before continuing. Please see http://www.nchmis.org for more information.

NOTE: Due to the nature of homeless outreach, not all information necessary for program enrollment may be supplied by the client at the initial contact. Outreach workers may have to perform a number of contacts before all information is collected, ultimately leading to client enrollment. Outreach workers should update the record with new information as it is collected from the client.

NOTE: If your default provider page is not your PATH project:

- Click **Enter Data As** function (upper right hand corner) to switch to the correct PATH project.

NOTE: Click **Back Date** function (upper right hand corner) if initial client contact took place prior to the current date.

- Change the date (to reflect actual data collection) and change the time to **the time of initial contact, or 2:00 AM if the time of contact is not known**.

1. Click **ClientPoint** module and **Search** for an existing client (or add a new Client).
   a. Search for existing: Enter the ***Client First*** and ***Last Name*** and the last four of the ***SS#.***
      - Review the Client Results list to further identify clients by their *Gender* and *Year of Birth*
   b. If the client record does not exist:
      - Also complete the ***Name Data Quality****,* the full ***Social Security Number***, ***SS# Data Quality***, and ***U.S. Military Veteran*** questions (in addition to the First & Last Names)
      - (If a client only presents a street name or pseudonym, that may be used to create the record until such time that a full legal name is collected.)
         - Note: If the full social security number is not available at the initial point of contact, the PATH Outreach worker will need to work with the CoC Local System Administrator to complete this field after initial record creation, due to security restrictions.
      - Click **Add New Client With This Information**.
2. Click **Household Tab** to create a Household (where applicable)
   a. See “Household Addendum” for more information
3. Click **ROI** tab to add a Release of Information.
   a. Spread to all HH members (by checking the boxes), where applicable.
   b. Be sure the End Date corresponds with the negotiated end date between the agency and the client

c. Secure Client Profiles (if necessary) see "Securing Client Records Training 5.11" for more information
d. (Note, if a verbal ROI is obtained, the end date should correspond with an agency agreed upon policy for verbal ROIs, usually 48 hours to 7 days, but it is advised to not make it longer than 10 days without a signed release.)

4. Click **Entry/Exit** tab to add a program **<u>Entry</u>**
   a. Spread to all HH members (by checking the boxes), where applicable
   a. *Type of Entry*: **PATH**
   b. *Entry Date*: date of initial contact with the client(s).
   c. Complete the Household Data Sharing Assessment, where applicable (skip if Single).
   d. Complete the assessment by following the **section headers** as guides, indicating which questions are answered for whom.
      - See the "5.11 Sub-Assessment Training Addendum" for more information regarding the **Monthly Income**, **Non-Cash Benefits**, and **Health Insurance** sub-assessments
      - Record all data elements known at the initial date of contact on the Project Entry. Subsequent Information collected will be entered on Project Updates.
      - Add initial Outreach Records to the Client Entry.
   e. Switch to other members' records, where applicable. Save & Exit when finished.
5. Click **Case Plans** Tab
   a. Add goals as necessary for clients
6. Click **Service Transactions** tab using the **Add Multiple Services** icon.
   a. Spread to all HH members (by checking the boxes), where applicable.
   b. See "Service Transactions Addendum" for more information.
   c. Continue to add Services throughout project enrollment. For a list of funded PATH Services and Referrals see Appendix A and Appendix B on the NC PATH Provider Page Setup Document
7. Click **Add Referrals** to add a referral for a client
   a. Spread to all HH members (by checking the boxes), where applicable
   b. Select the appropriate Service Code and Term from the **Service Code Quicklist** then click **Add Terms**.
   c. Select a referral provider from the Referral Provider Quicklist, or Search for a referral provider. Click the **Green Plus** next to the Provider to select.
   d. Under **Need Status** and **Outcome**, select **Closed** and **Fully Met**.
   e. Click **Save All**

Continue to update and maintain client records while client is enrolled in the project.

8. Click the *Interim Review* icon located on the Entry/Exit tab, when appropriate

9. Click **Add Interim Review**

   (Note: The Interim Review form does not include the general demographics questions regarding clients. If a PATH worker is updating general demographics information, (i.e. DOB, race, gender, ethnicity,) or housing status questions, (i.e. housing status, prior living situation, length of stay in previous place), these updates should be done on the client entry.)

   a. Spread to all HH members (by checking the boxes), where applicable.
   b. Select the *Interim Review Type* and the *Review Date* to reflect the date of Interim
   c. Update **Income**, **Non-Cash Benefits, Health Insurance** and other client information.
      - Make sure to add Outreach Contacts as appropriate.
      - If nothing has changed, simply Add Interim Review, select Interim Review Type, add the Review Date, Save & Continue, then Save & Exit.
   d. Switch to other members' records, where applicable. Save & Exit when finished.
10. Continue to add Referrals and Services throughout, when applicable.

When to Exit a Client:

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.

11. Click **Entry/Exit** tab to add a program **<u>Exit</u>**
   a. Click the **Edit pencil** below the words "Exit Date"
   b. Spread to all HH members (by checking the boxes), where applicable.
   a. Enter the *Exit Date* (if not todays date), *Reason for Leaving,* and *Destination*.
   b. Update and/or complete the assessment for <u>all</u> HH Members, unless (section header) indicates otherwise.
      - If appropriate, update the **Income, Non-Cash Benefits,** and **Health Insurance** sub-assessments. See "5.11 Sub-Assessment Training Addendum".
      - Answer the **Date of Engagement, Date of PATH Status Determination, Client Became Enrolled in PATH, If no, reason not enrolled**, and **Connection with SOAR** questions if applicable.
      - Switch to other members' records, where applicable. Click Save & Exit when finished.
   c. Ensure all Goals in the Case Plan are appropriately closed out.