



# PATH HMIS Training

April 2022



**NC COALITION** to  
**HOMELESSNESS** end

# Agenda

- PATH Workflow Timeline
  - Earning trust and entering Start data gradually
  - Interims, Services, and Referrals
  - Exiting for accuracy
- Reports to show your work



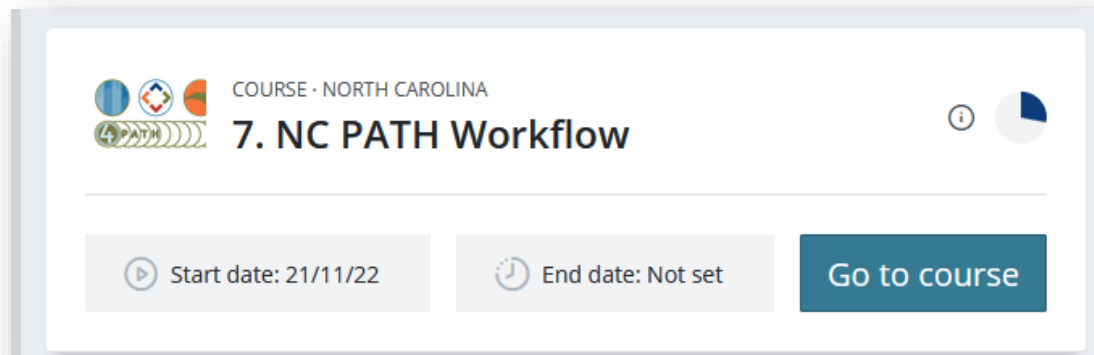
PATH is hard! But we  
can do hard things!



# Materials to Reference

## Learning Management System (LMS)

- [icatraining.org](https://icatraining.org)
- Entry, Interim, Exit and Service Transactions videos



A screenshot of a Learning Management System (LMS) course page. The page header includes the text "COURSE · NORTH CAROLINA" and "7. NC PATH Workflow". Below the header, there are two buttons: "Start date: 21/11/22" and "End date: Not set". A prominent blue button labeled "Go to course" is positioned to the right of the date buttons. The page also features several icons, including a play button, a clock, and a gear.

## ZenGuide Knowledge Base

- [Program Specific Overview: PATH](#) (including Services Crosswalk)
- [PATH Decision Tree](#) (for project type)
- [PATH Workflow](#)

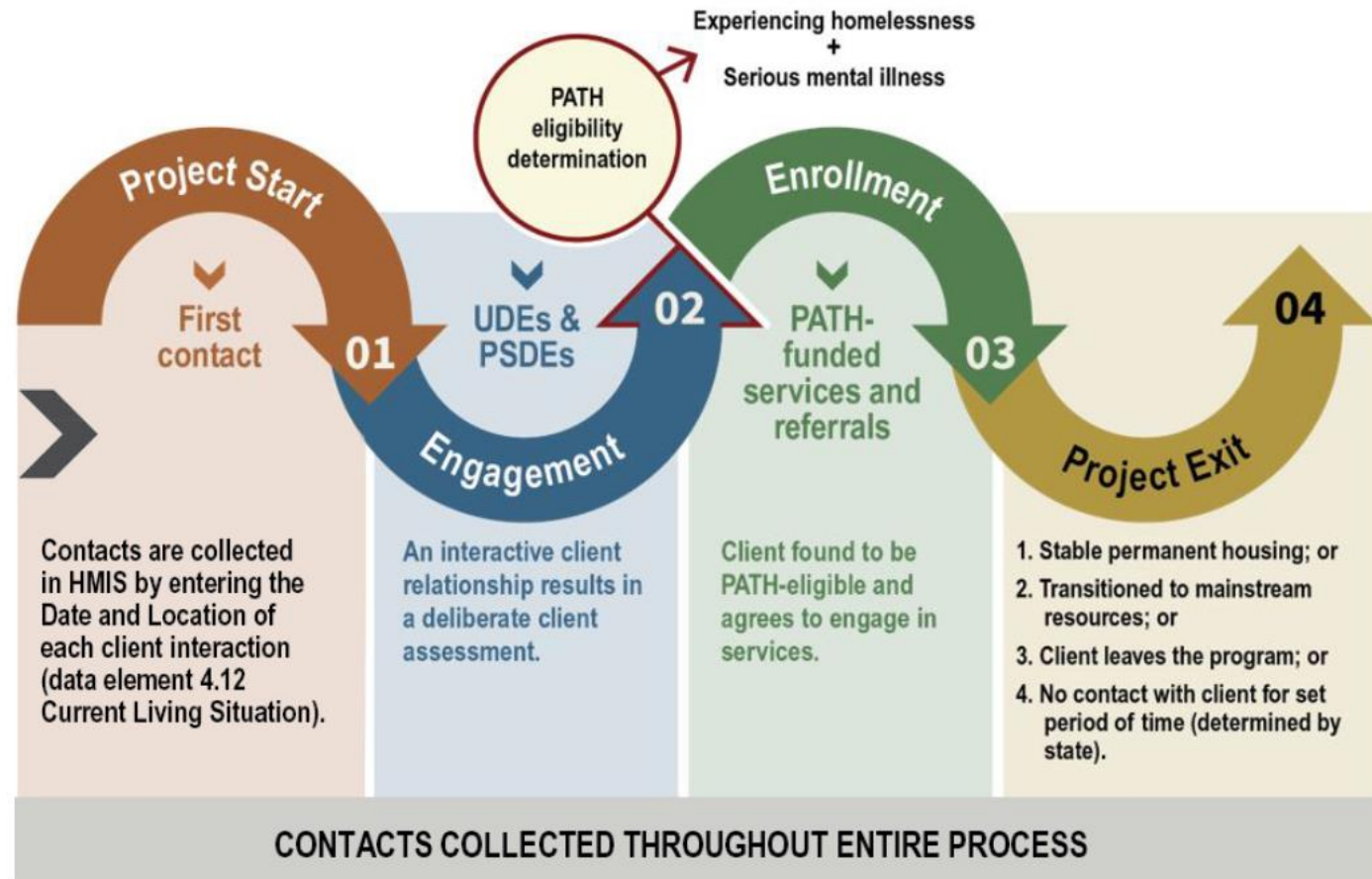


A screenshot of a ZenGuide Knowledge Base article. The breadcrumb trail reads "HMIS@NCCEH ZenGuide > General HMIS Information > Program Specific Data". The main heading is "Program Specific Overview: PATH". Below the heading, a note states: "This article is intended for HMIS users with access to PATH projects. It is encouraged to reference the HUD issued PATH Program HMIS Manual".

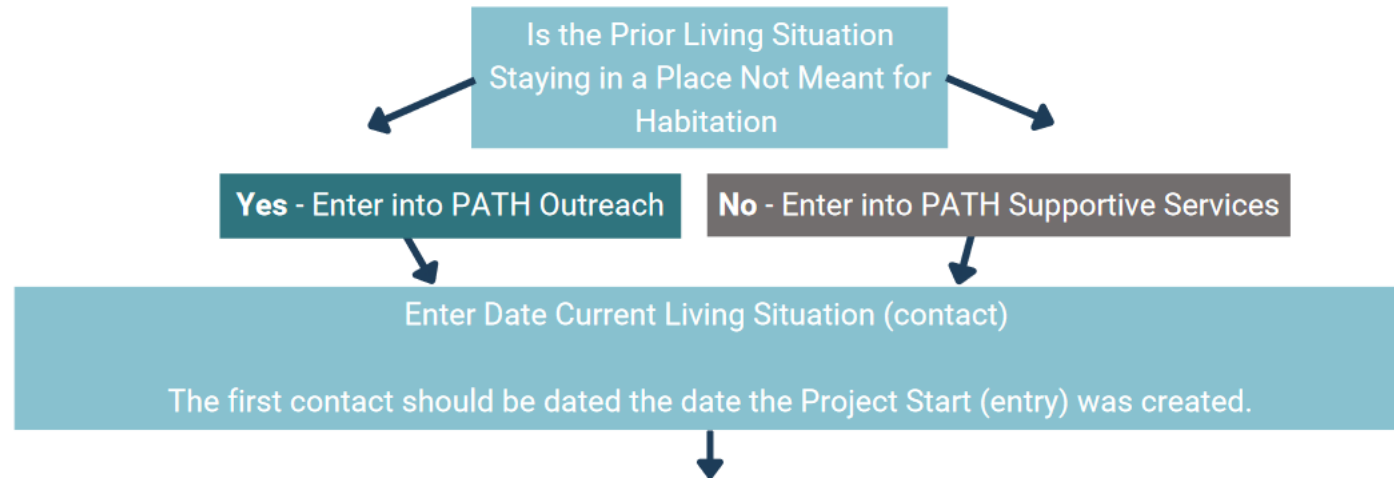


# **PATH Workflow Timeline**

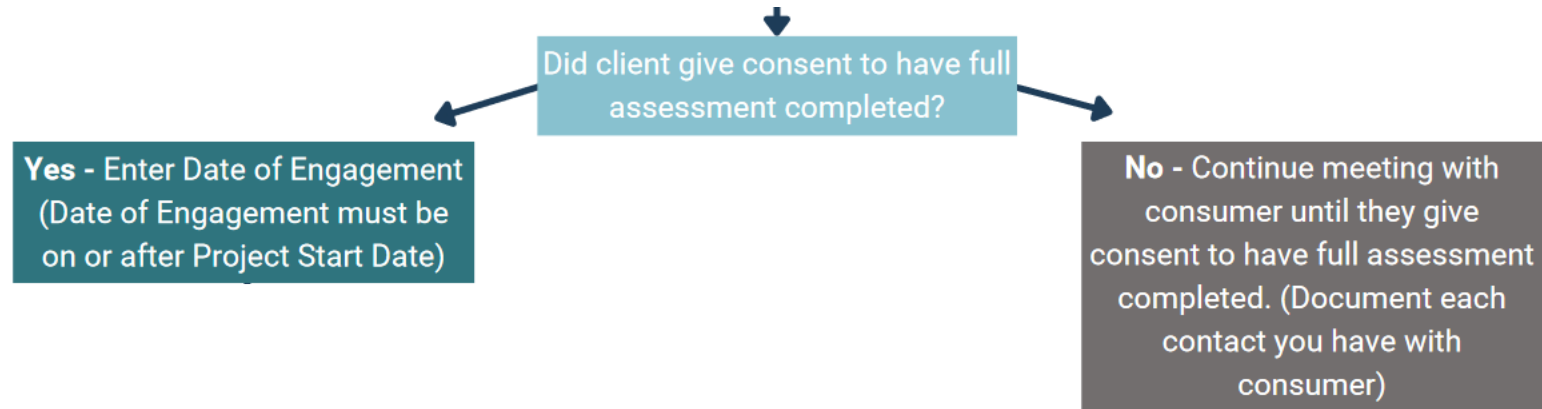
# PATH Workflow Timeline



# PATH Workflow Timeline – Project Start

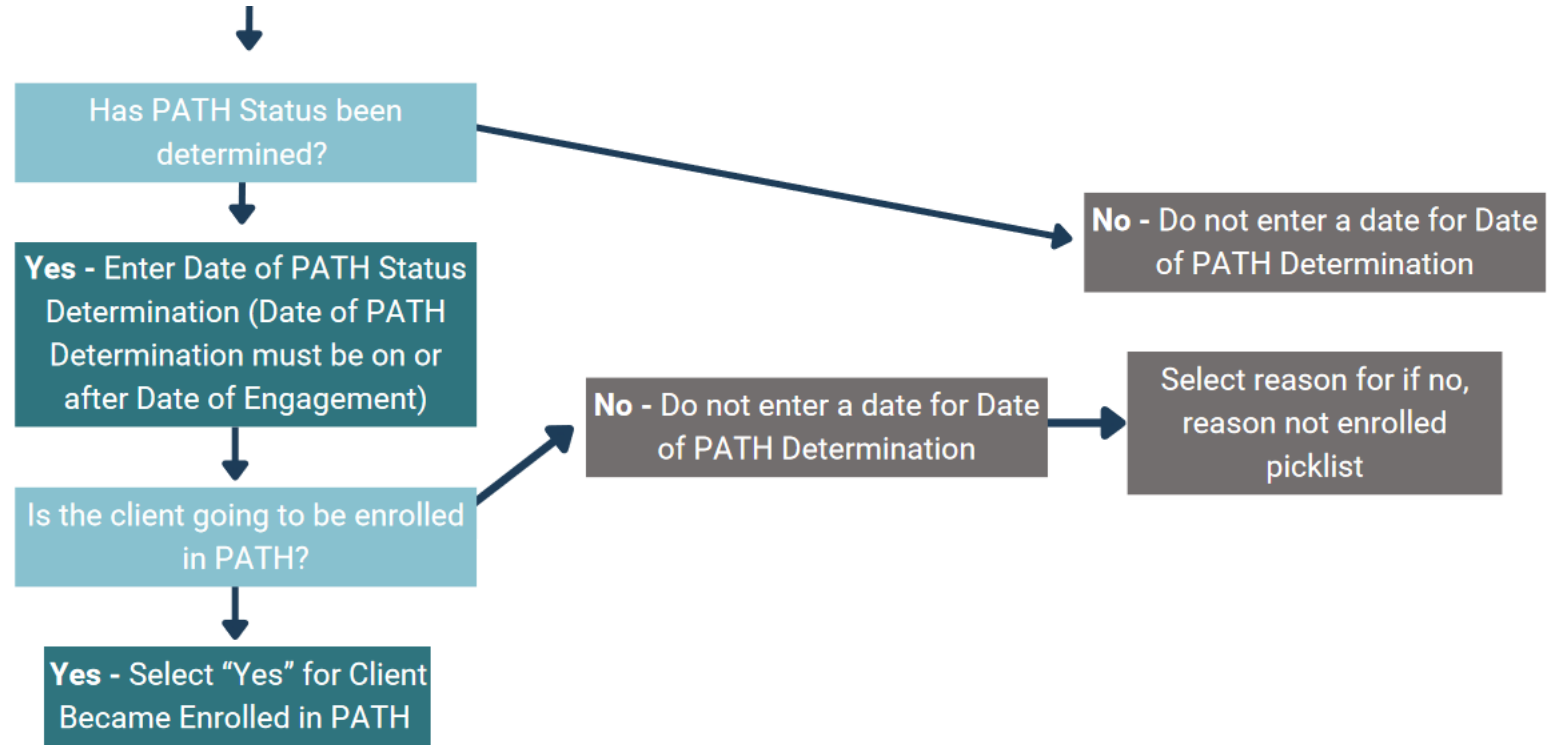


# PATH Workflow Timeline – Engagement





# PATH Workflow Timeline - Enrollment



# PATH Workflow Timeline – Interims, Services, Referrals

## What must be collected as you serve a client?

- Interims to add
  - Current Living Situation
  - Connection to SOAR
  - CE related data
- Service Transactions to record
  - Services Provided – PATH Funded
  - Referrals Provided – PATH Funded



# PATH Workflow Timeline - Exit

Make sure to complete PATH Status at Exit (if not already completed)

Exits can happen when clients enter shelter, transfer programs, move into housing or an inactive client's last contact date



# PATH Workflow Timeline - Exit

How to exit inactive clients



Backdate  
to Exit



NCCEH



Demo



# Reports
















# Reports to show your work

## ESG-CAPER

- Data quality checks
- Summary client counts /demographics
- Not Engaged, Engaged, and Inactive clients

## PATH Report

- PATH specific client counts
- PATH Services and Referrals
- Outcomes like Income and Insurance changes

Provider Reports				
 Call Record Report	 Client Served Report	 FY2023 CoC APR	 FY2023 Coordinated Entry APR	 Daily Unit Report
 FY2023 Data Quality Framework	 Duplicate Client Report	 FY2023 ESG CAPER	 Fund Availability Report	 Fund Usage Report
 My Managed Funds Report	 Needs Report	 PATH	 Referrals	 Service Transaction



HERE'S A CAN TO REMIND YOU THAT

YOU CAN DO IT!

Your work matters to your clients, your team, and your community!



NCCEH



# Program Decisions

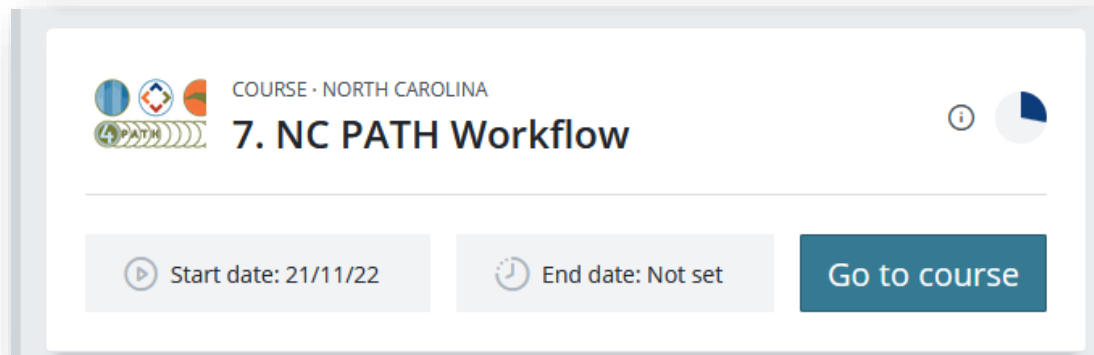
- Pseudonym or Alias pattern
- Quicklist for types of services
- Quicklist for referral projects



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## Contact NCCEH

hello@ncceh.org

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## Contact NCCEH Data Center Help Desk

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NCCEH