PATH Outreach workflow

**Opening Clients**

1. Search for client in HMIS database
   1. If no client is present with that name or SSN, create a new client record with as much detailed information as possible
   2. Incomplete client records are OK for street outreach clients if you were unable to collect complete information about them.
   3. Add additional family members to the household if applicable
2. Add Electronic ROI to the ROI tab in Clientpoint if ROI was obtained
   1. If you obtain an ROI after opening them in the Street Outreach project, backdate the ROI to the date they were opened in the project
3. Create Entry/Exit record in Clientpoint
   1. The opening date for your project is the first time they received any services from the PATH outreach project
      1. Note: PATH clients living in Emergency Shelter or in housing should be entered into a PATH Supportive Services project rather than a PATH Street Outreach project
   2. Enter all available information in the PATH entry assessment, especially
      1. Demographic information (DOB, Race, Ethnicity, Household Composition)
      2. Prior Living Situation
      3. History of Homelessness (# of times literally homeless in the last 3 years, # of months homeless in the past 3 years, Approximate Date Homelessness Started)
      4. Income (view old records for accuracy)
      5. Non-Cash Benefits
      6. Health Insurance
      7. Disabilities
      8. Domestic Violence
      9. Initial Contact under “Current Living Situation” sub-assessment
   3. Make sure to check that HUD verifications are complete and that all records are current (Green check-box)

**Recording contacts after initial opening:**

1. Record each contact with the client in an interim assessment, and as a record in the “Current Living Situation” sub-assessment.
2. If client “engages” with the outreach program and provides more information about their situation
   1. Complete the intake assessment by editing their Entry/Exit Record
   2. Add an interim assessment on their “date of engagement” and fill in the date of engagement.
   3. NOTE: Data quality is only measured for clients with a date of engagement.
   4. After client is engaged, fill out the following elements:
      1. “Date of PATH Status Determination”
      2. “Client Became enrolled in PATH”
      3. “Connection with SOAR”
3. Add Service Transactions
   1. Make sure that the fields for “Type of PATH FUNDED Service Provided” are filled out
4. Add Referrals
   1. The provider you refer to should be a dummy provider named for your project
   2. Make sure that fields for “Type of PATH Referral” and “If any ‘Type of PATH Referral’ made, select Outcome” are filled out appropriately
   3. Check that need status is closed
5. Add case notes, measurements, and other service transactions as required by your agency

**Checking client out**

1. When the client moves to shelter or a permanent housing situation, exit them from the street outreach program with the appropriate destination.
   1. Positive outcomes for street outreach programs are Temporary or Permanent destinations listed in the destination menu.
2. Update client’s income, non-cash benefit, and health insurance information with any changes that have occurred since they were opened with your project