



# PATH ANNUAL REPORT GUIDE FOR CLIENTTRACK

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PURPOSE

The purpose of this guide is to provide information to users with PATH projects in GAHMIS - ClientTrack. The guide also provides details on the PATH Annual Report to ensure accurate reporting.

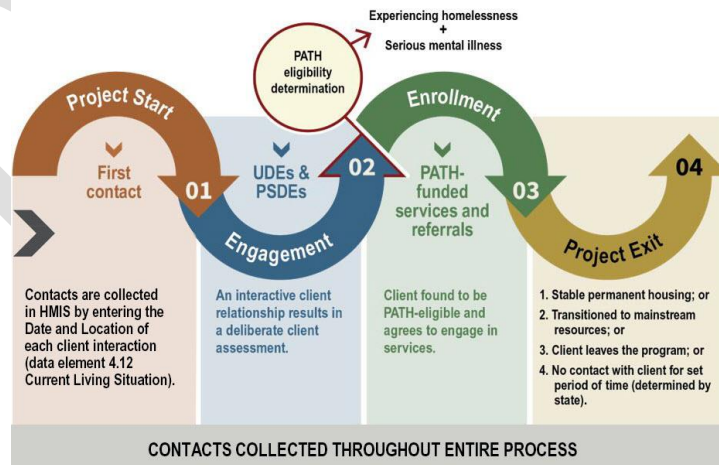
PATH PROJECT (PROGRAM) TYPES

Each PATH grantee has two different projects set up within ClientTrack. One is for PATH Street Outreach and the other for PATH Supportive Services. It is vitally important that the correct project be utilized for each client in order to ensure correct reporting for both the PATH grantee and the Continuum(s) of Care in which they operate.

PATH Project Type	Eligible Clients
PATH Street Outreach	Clients living in places not meant for habitation at first contact (same as project start).
PATH Supportive Services	Clients living in places meant for habitation at first contact (same as project start), which includes emergency shelter and those who are at risk of homelessness.

PATH DATA COLLECTION WORKFLOW

The [PATH Program HMIS Manual](#) workflow diagram for the 4 relevant data entry points(p.17):



The PATH Report Manul data collection process, with additional DBHDD guidance:

*DBHDD encourages all warnings are fixed in HMIS & the report re-run and re-uploaded. If that does not remove the warning, then provide explanation.*

PATH Data Collection Process					
Step 1	2	3	4	5	6
PATH provider enters client data into the local Homeless Management Information System (HMIS).	PATH provider extracts PATH Annual Report data from HMIS (12 months of data).	PATH provider inputs provider-level data into the PATH Data Exchange (PDX) during the PATH reporting period.	PDX runs two tests as data is entered: <ul style="list-style-type: none"> <li>Validation tests ensure that the data entered aligns with the logic of the data elements. Reports cannot be submitted with validation errors.</li> <li>“Warnings” identify atypical data. Providers must enter a comment in PDX to explain the atypical data.</li> </ul>	When all data fields are complete and validation errors and warnings are cleared, PATH provider submits the report in PDX.	State PATH Contact reviews all PATH provider reports; if errors are identified, State PATH Contact can re-open the provider’s report and request that the provider review the data in HMIS and make changes as needed.
7	8	9	10	11	
When the reports are finalized, State PATH Contact approves the reports in PDX.	Data from “Warnings” in PDX is reviewed by SAMHSA and contract staff. State PATH Contacts are contacted to obtain additional explanations and information as needed.	Data is finalized and data tables reflecting state-level and national PATH data are developed.	SAMHSA reports to Congress on national PATH data measures.	PATH receives funding from Congress to continue providing PATH services.	

**PATH TERMS AND DEFINITIONS**

<b>PROJECT START:</b>	The date of first contact between the PATH-funded worker and the client.
<b>CONTACT:</b>	An interaction between a PATH-funded worker(s) and an individual who is potentially PATH eligible or enrolled in PATH. Contacts may range from a brief conversation between the PATH-funded worker and the client about the client’s well-being or needs, to a referral to service. A contact must always include the presence of the client—the facilitation of a referral between a PATH-funded worker and another case manager or service provider without the involvement of the client would not be considered a contact. A contact may occur in a street outreach setting or in a service setting such as an

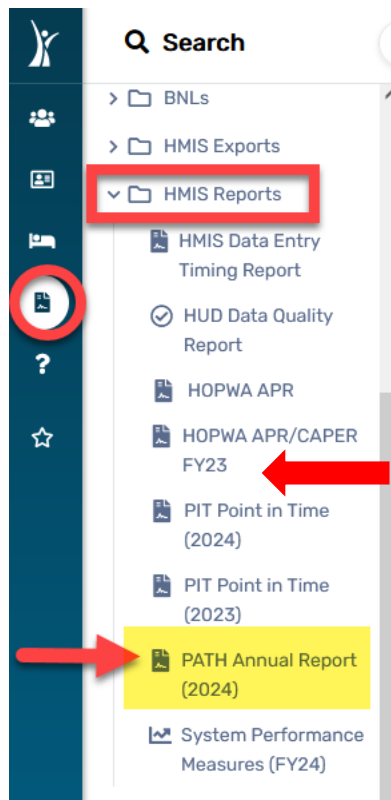
	emergency shelter or drop-in center. Contacts are recorded in HMIS using Current Living Situation (data element 4.12)
<b>ENGAGEMENT:</b>	The point at which an interactive client relationship results in a deliberate client assessment or the beginning of a case plan. Engagement is a one-time event, may occur on or after the project start date, and must occur prior to PATH enrollment and project exit. (Entered as a date).
<b>ENROLLMENT:</b>	The point at which the PATH-funded worker can determine if a person is eligible for the PATH Program. Only persons eligible for PATH can receive a PATH-funded service or referral. Additionally, the 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. HMIS Data Element P3 PATH Status provides additional information regarding PATH enrollment.
<b>REFERRAL:</b>	Active and direct PATH staff support on behalf of or in conjunction with a PATH-enrolled individual to connect to an appropriate agency, organization, or service. Referrals are only reported for PATH-funded referrals provided to a PATH-enrolled individual. Referrals are not services, if the PATH provider does not actually deliver the PATH-funded service it should be entered as a referral not a service.
<b>SERVICES:</b>	A specific PATH-funded assessment, benefit, or form of assistance provided to a PATH-enrolled individual. PATH-funded services may include screening, clinical assessment, community-based mental health services, substance use treatment, and housing assistance. Services are only reported for PATH funded services provided to a PATH-enrolled individual. Descriptions of PATH-funded services may be found in the PATH Annual Report Manual. Services are not the same as referrals, so if the PATH provider does not actually deliver the PATH-funded service it should be entered in HMIS as a referral, not a service.

Definitions adopted from the [PATH Program HMIS Manual \(January 2024, pages 6-7\)](#).

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## ACCESSING THE PATH ANNUAL REPORT


1. From the Reports workspace, expand “HMIS Reports” and select the Path Annual Report (choose current year)




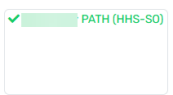
2. Users may save report settings for retrieving the report prompts for additional report runs. Select “Save Setting” and input a report name in the Saved Report Settings section.
3. Input Date Range in “Service Date Between”. This is your PATH reporting fiscal year.
4. The users Organization will be checked in the Organization section of the report.


- Users may also limit the report data to PATH Grants (s) by selecting the correct grants associated with PATH services or select the PATH Program(s) associated with the PATH Annual Report for your Organization. This is likely both Street Outreach and the Services only program (projects in HMIS).

#### PATH Grant(s)


Check the box to limit report results by selected grants. When checked, the list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separately, or click the  icon to select all. Additionally, on this report you can only filter by PATH grants.

Grant(s):  Filter by Grant(s)

**Select by Grant or by Program** 

#### PATH Program(s)







Check the box to limit report results by selected program. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the  icon to select all.

Program(s):  Filter by Program(s)

## RUNNING THE REPORT

- The PATH Report is available in a summary report, which allows users to drill down into the report and export details of the PATH Report.
  - A new window will appear with the HMIS PATH Annual Report summary data. This report can then be saved as a PDF for reference. There are 5 pages of data on the report. Be sure to use arrows to review the full report.
  - Users may click on link “Questions 8-16: Persons served” and export the client level detail for these fields in the report. These fields will appear in the Report Viewer Window. Users can then export the excel data for this section of the report.
  - Users may click on link “Question 17: Services Provided” and export the client level detail for these fields in the report.
- The PATH Report may also be scheduled to run.
- The PATH Report “Export” may also be run. This includes the total counts for each of the PATH Annual Report questions. The CSV files in this export do not include client level data for troubleshooting.

<input type="checkbox"/> Name	Type	Compressed size	Password prot...	St
 Q8-Q16	Microsoft Excel Comma Separate...	1 KB	No	
 Q17	Microsoft Excel Comma Separate...	1 KB	No	
 Q18	Microsoft Excel Comma Separate...	1 KB	No	
 Q19-Q24	Microsoft Excel Comma Separate...	1 KB	No	
 Q25	Microsoft Excel Comma Separate...	1 KB	No	
 Q26	Microsoft Excel Comma Separate...	2 KB	No	

## REVIEWING INFORMATION ON THE DRILL DOWN REPORT (QUESTIONS 8-16: PERSONS SERVED)

1. The following table includes information for each column of the PATH Drill Down Report. The information in the table will assist users in understanding how the exported data is included in the summary data for the PATH APR Report.
2. Blank fields indicate a potential data quality issue for the client.
3. Filters may be required to limit the exported data set. Filters are noted in the comments section. Here is a list of those filters and which columns to select/ filter to return the expected data set:
  - a. Filter for Enrolled PATH Status
  - b. Deduplication

Report Field	Sample Data	PATH APR Field(s)
Organization	Example Org	
ProgramName	HOPE ATL ICA Training (PATH- SO- 500)	
ProgramID	21228	
ProgramType	Street Outreach	Q9,Q10,Q11 Filter on project type
CaseID	104411	Unique to enrollment and household members within the enrollment
CaseName	Bear, Masha	Family name for head of case* should be same as client name
ClientID	407952	Q8 Users must sort the data on the latest project start date, then deduplicate export to get total clients
ClientName	Bear, Masha	N/A
BirthDateQuality	Full DOB Reported	Q26b.
Age	21	Q26b.
SSNQuality	Full SSN	N/A

Race_AmericanIndianAlaskanNative	No	Q26c.
Race_Asian	No	Q26c.
Race_BlackAfricanAmerican	No	Q26c.
Race_NativeHawaiiinPacifclsander	Yes	Q26c.
Race_White	No	Q26c.
Race_ClientDoesntKnow	No	Q26c.
Race_ClientPrefersNotToAns	No	Q26c.
Race_DataNotCollected	No	Q26c.
RaceAndEthnicity	NativeHawaiiinPacifclsander ,Hispanic/Latino	Q26c.
Orientation	N/A	N/A
Gender_Woman	Yes	Q26a.
Gender_Man	No	Q26a.
Gender_CulturallySpecific	No	Q26a.
Gender_Transgender	No	Q26a.
Gender_NonBinary	No	Q26a.
Gender_Questioning	No	Q26a.
Gender_DiffIdentity	No	Q26a.
Gender_DoesntKnow	No	Q26a.
Gender_PrefersNotToAns	No	Q26a.
Gender_NotCollected	No	Q26a.
Gender	Woman (Girl, if child)	Q26a.
DisablingCondition	Yes	Will be consistent with barriers -required yes for Q26f.
VeteranStatus	No	Q26e.
ProjectStartDate	5/1/2021	Q9,Q10,Q11 Enroll dates must be after reporting period. Clients with enroll date prior to start of report are not counted. Sort on this



		column by "latest" prior to deduplicate. Note, this is the HUD Data Standard element, "Project Start" not the PATH clients date of enrollment, which is collected with combined fields "date status determined" and "enroll status" = YES.
EngagementDate	5/7/2021	4.13 - counted in reporting where there is not a contact.
DateStatusDetermined	5/7/2021	P3 - counted in reporting where there is not a contact.
EnrollStatus	Yes	Use to Filter for Enrolled PATH Status.
NotEnrolledReason		Detail
ProjectExitDate		Required for inclusion in Q25.
ExitDestination		Q25. Housing Outcomes

Relationship	Self	Filter
SOARStatus	No	Q26g.
ClientLocation	Atlanta CoC	UDE, not reported
PriorResidence	Place not meant for habitation	Used to categorize 26h.
HealthInsuranceAtEntry	No	Q22, Q23, Q24
HealthInsuranceMostRecent	No	Q22, Q23, Q24
HealthInsuranceExit		Q22, Q23, Q24
CashStatusAtEntry	No	Q19B
NonCashStatusAtEntry	No	Q19B
CashStatusMostRecent	No	Q19D
NonCashStatusMostRecent	No	Q21D
CashStatusExit		Q19C
NonCashStatusExit		Q21C
MentalHealthStatus	Yes	Q25f
AlcoholAbuseStatus	Yes	Q25f
DrugAbuseStatus	No	Q25f
Co-occurring	Yes	Q25f
MentalHealthReceivingServices	Data Not Collected	Q17
MentalHealthServicesAnySourceQ16	Yes	Q16
SubstanceAbuseReceivingServices	Data Not Collected	Q17
ChAtEntry	Yes	Q26j
Instances of contact this reporting period prior to date of enrollment		2 12a
Total instances of contact during the reporting period		4 12b
HasPATHFundedService	Yes	Q17
HasPATHFundedReferral	Yes	Q18
HasAttainedPATHFundedReferral	Yes	Q18
DomesticViolenceHistory	No	Q26k
SSIAtEntry	No	Q20B
SSIMostRecent	No	Q20C
SSIExit		Q20D
SSDIAtEntry	No	Q20B

SSDIMostRecent	No	Q20C
SSDIExit		Q20D
MedicaidAtEntry	No	Q23B
MedicaidMostRecent	No	Q23D
MedicaidExit		Q23C
MedicareAtEntry	No	Q23B
MedicareMostRecent	No	Q23D
MedicareExit		Q23C
AllOtherHealthInsuranceAtEntry	No	Q24B
AllOtherHealthInsuranceMostRecent	No	Q24C
AllOtherHealthInsuranceExit		Q24D
LengthofStayinPriorLivingSituation	One year or longer	26I

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