HOUSING ALLIANCE DELAWARE

PATH OUTREACH DATA ENTRY WORKFLOW

1) **INITIAL CONTACT**
   A) Meet with/observe the client and collect as much information as you can.
      i) Name, gender, race, current location, Current Living Situation can be collected, and can be checked/confirmed during engagement.
      ii) Naming Convention – A code name can be used to enter and track observed clients.
         (a) First Name – Put the initials of your organization (ex. RII) before the client's first name if they do not provide their full name. If client's first name is not provided, First Name field will be an observed descriptive characteristic. Examples: RII Thomas / RII RedCap
         (b) Last Name – Put the initials of your organization (ex. RII) before the client's last name if they do not provide their full name. For observed clients, Last Name field will be their location or time of observation. Examples: RII WilmingtonRiverfront / RII 062920211238PM

2) **ENGAGEMENT**
   A) Complete all necessary intake paperwork.

CMIS DATA ENTRY

3) **BACK DATE MODE**
   A) Set Back Date Mode to date and time of the client's initial contact or observation.

4) **CLIENTPOINT – SEARCH**
   A) Search for client by their name or using your organization's initials. Those who do not have a profile will need one created.

5) **CLIENT PROFILE**
   A) Enter/review and update client's Universal Data Elements (UDEs).

6) **HOUSEHOLDS**
   A) Check that all household members being served by Street Outreach team are found in the same household. If not, add additional household members now.

7) **RELEASE OF INFORMATION (ROI)**
   A) Add Release of Information for all household members under the Parent Provider (ex: DSAMH) valid for three years.

8) **ENTRY/EXIT**
   A) All clients, including observed clients, must be enrolled in the Street Outreach project to be counted.
   B) Select all household members that are being enrolled into Street Outreach.
   C) Add an Entry/Exit under the specific program the client is being served by.
   D) Review and update all questions on the Entry Assessment that have been answered during contact or observation.
      (a) A new Current Living Situation should be entered for every contact with the client.

E) All Entry Assessment questions must be completed before or at the Date of Engagement.

9) **DURATION OF PROGRAM ENROLLMENT**
   A) If clients are receiving case management,
      i) Case Management tab – add clients' case manager
      ii) Case Plans tab – upload files relating to clients' case management.
   B) Interims – record updates/changes in a client's information throughout their program enrollment.
      i) Additional Current Living Situations
      ii) Date of PATH Status Determination
         (a) PATH Enrollment
      iii) Connection with SOAR

10) **SERVICE TRANSACTIONS**
    A) Add Services for each service provided to client.
    B) Type of PATH FUNDED Service Provided

11) **PROJECT EXIT**
    A) Clients are to be exited from the Street Outreach program when they stop receiving services or are not in contact with Street Outreach after 30 days.
    B) Select all household members exiting the project.
    C) Select the Reason for Leaving and Destination that best reflects the client's situation.
    D) Update the Exit Assessment with any information not collected at Entry or through an Interim.