PDX USER GUIDE FOR PATH PROVIDERS

FY 2020

This user guide is intended to be used by PATH providers when completing their PATH Annual Reports or PATH Progress Reports in PDX. A separate user guide is available for State PATH Contacts (SPCs) on the PDX website.

Contents

OVERVIEW AND BACKGROUND

PATH DATA COLLECTION AND REPORTING REQUIREMENTS

In November 2013, SAMHSA released the **Technical Assistance Plan for PATH Program Participation in HMIS**, which describes the Substance Abuse and Mental Health Services Administration's (SAMHSA) goals for Projects for Assistance in Transition from Homelessness (PATH) participation in a Homeless Management Information System (HMIS). In line with that guidance, SAMHSA expected full PATH participation in HMIS by the end of each state/territory's fiscal year (FY) 2016. Full participation is considered to mean entering all PATH client data directly into the HMIS designated by the local Continuum of Care (CoC), both for client care coordination and generating the PATH Annual Report.

The participation of PATH providers in their local HMIS is critical for many reasons:

1. SAMHSA requires that client-level data collection for the PATH project occurs in the local HMIS to ensure that data on the PATH program is integrated into local planning and strategic efforts to end homelessness through the local CoCs that are served by each PATH project.
2. SAMHSA expects PATH providers to participate in their local CoC to engage in program planning and implementation activities, discussions regarding effective client service coordination, and discussions to solve issues and challenges related to PATH data collection in HMIS.
3. The integration of PATH into HMIS is also intended to improve project design and service delivery and to better understand and respond to the needs of persons experiencing homelessness.

The primary resource for PATH-specific guidance on HMIS is the *PATH Program HMIS Manual*, which was updated and released in June 2020 by the U.S. Department of Housing and Urban Development (HUD). All SPCs and PATH providers should review this resource because it contains information on key topics, including PATH project set-up in HMIS and PATH data collection definitions and expectations.

PATH providers are required to use HMIS to generate their report, and they must do so using the PATH Annual Report that their HMIS software vendor has programmed into their system. HUD maintains programming specifications for HMIS vendors to utilize when creating the PATH Annual Report in their software. SPCs should work closely with their local HMIS lead agency to ensure their software vendor has programmed the PATH Annual Report correctly.

The latest versions of the *PATH Program HMIS Manual* and the PATH HMIS programming specifications can be found on the PATH Data Exchange (PDX) website.

Contact information for each CoC and HMIS lead agency is available from the HUD Exchange Grantee Contact Information page.

OVERVIEW AND BACKGROUND

IMPORTANT CHANGES TO PDX REPORTING FOR FY2020

Effective October 1, 2019, the HMIS Data Standards have been further updated. The changes in the HMIS Data Standards are reflected in this version of the PATH Annual Report Manual, and include:

1. When needed, field response options and questions have been updated to align with the most recent version of the HMIS Data Standards. This includes:
    a. Question 25: Destination at exit
        i. 25a1: added RHY-funded Host Home Shelter
        ii. New response option added 25a9: Host Home (non-crisis)
        iii. New response option added 25a27: Rental by client, with HCV voucher (tenant or project based)
        iv. New response option added 25a28: Rental by client in a public housing unit
        v. Removed response option 25a29: Residential project or halfway house with no homeless criteria
    b. Question 26a: Gender
        i. 26a3 is now Trans Female (MTF or Male to Female)
        ii. 26a4 is now Trans Male (FTM or Female to Male)
    c. Question 26h is now Prior Living Situation
        i. 26h2: added RHY-funded Host Home Shelter
        ii. Removed response option 26h4: Interim Housing
        iii. 26h17 changed to Rental by client, with RRH or equivalent subsidy
        iv. New response option added 26h18: Rental by client, with other ongoing housing subsidy
        v. New response option added 26h19: Rental by client, with HCV voucher (tenant or project based)
        vi. New response option added 26h20: Rental by client in a public housing unit
        vii. New response option added 26h25: Host Home (non-crisis)
2. Addition of an “Unable to Locate Client” response option to PATH Status
    a. Previous question 13: Number of new persons contacted this reporting period who could not be enrolled because of ineligibility for PATH is now separated into:
        i. 13a. Number of new persons contacted this reporting period who could not be enrolled because of ineligibility for PATH
        ii. 13b. Number of new persons contacted this reporting period who could not be enrolled because provider was unable to locate the client
3. The following question was added.
    a. Question 26k: Domestic Violence History

PDX WEBSITE

PURPOSE OF THE PDX WEBSITE

The PATH Data Exchange (PDX) website is the online portal that PATH providers utilize to submit their PATH Annual Report to SAMHSA. Additionally, SPCs have access to PDX to review and approve reports that are submitted by PATH providers.

In addition to using PDX to submit PATH Annual Report data, PDX can also be used to submit quarterly progress reports. Not all states or territories require the submission of quarterly progress reports, but those that do use the reports to review data throughout the year rather than waiting until the annual submission of data to see the progress of each PATH project in their state or territory.

All PATH resources are stored on PDX as well, including user guides, manuals, data collection and reporting requirements, and recordings of recent PATH-related webinars, such as the PATH HMIS Learning Communities.

PDX also has a “Reports” section that allows users to generate individual project reports, state reports, regional reports, and national reports.

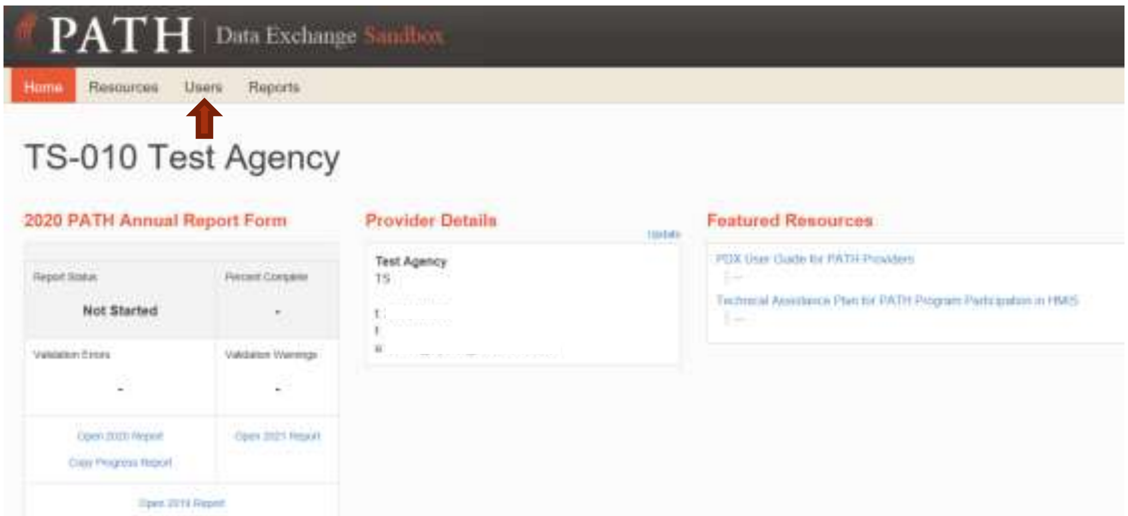
CREATING AN ACCOUNT IN PDX

If you are new to PDX, then your first step is to create an account in the system. **If there are staff at your agency that already have an active account in PDX,** then please have the existing user follow the steps for "Adding a New User."

If no one in your agency has an active account in PDX, then please contact your SPC so that they can set you up with an account.

Adding a New User

1. Log on to PDX and click "Users."



2. This will bring up a list of all the users associated with your provider agency.

   First, **use the search bar to search for the person you want to add** to ensure that they do not already have a PDX account.

   If the search shows that an account already exists, ask the user to follow the steps under "Logging in to PDX" to access his/her account.

3. If the search shows that an account does not exist, create an account by clicking "Add New User" at the bottom of the screen.

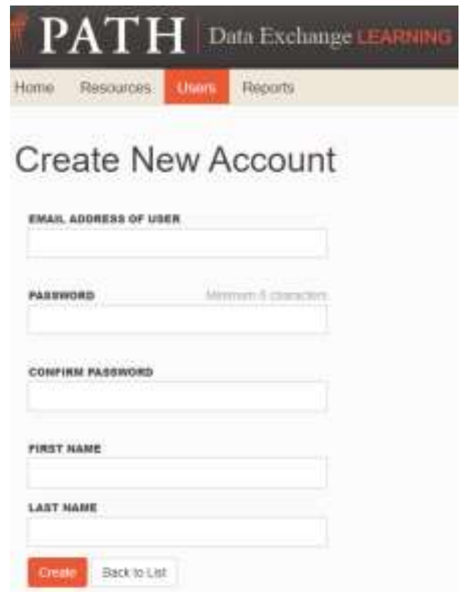
4. This will bring you to the "Create New Account" page.

   a. Enter the e-mail address of the user.

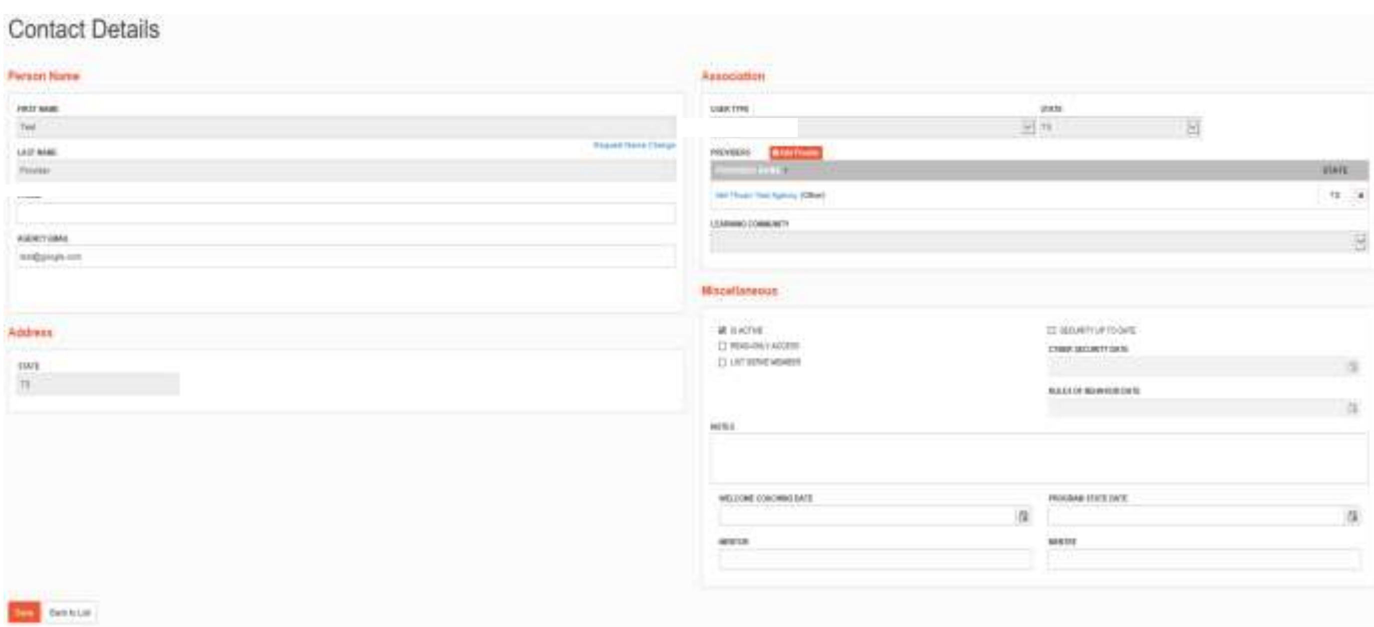
   b. Select a temporary password that you would like to assign to this user.

   c. Enter the First and Last Name of the user.

   d. Click "Create" at the bottom of the screen.



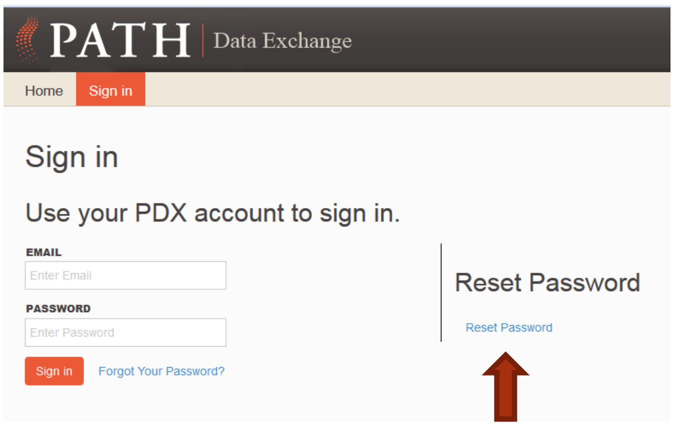
5. This will bring you to the "Contact Details" screen. You can choose to add additional details about the user on this screen, such as the person's phone number. Under "Miscellaneous," you can choose whether the user should have "Read-Only Access" (not able to edit data or add or change any information) and whether the user should be added to SAMHSA's listserv to receive messages sent to the PATH community.



6. Click "Save" at the bottom of the screen and the user will be added to the list of users associated with your state. You can then e-mail the user with the temporary password

you set for them. When the user signs into the system for the first time, the system will prompt the user to reset their password.

7. Users can reset their password by entering their e-mail address and clicking the “Reset Password” link. Users will receive an e-mail with the subject “PDX Password Reset” and must use the link within 3 hours to gain access to PDX.



PDX WEBSITE

LOGGING IN TO THE PDX WEBSITE

To access the PDX website, please follow these steps:

1. Open the PDX link in your internet browser: https://pathpdx.samhsa.gov/
2. When the PDX home page opens, click the "Sign in" tab under the PATH logo.

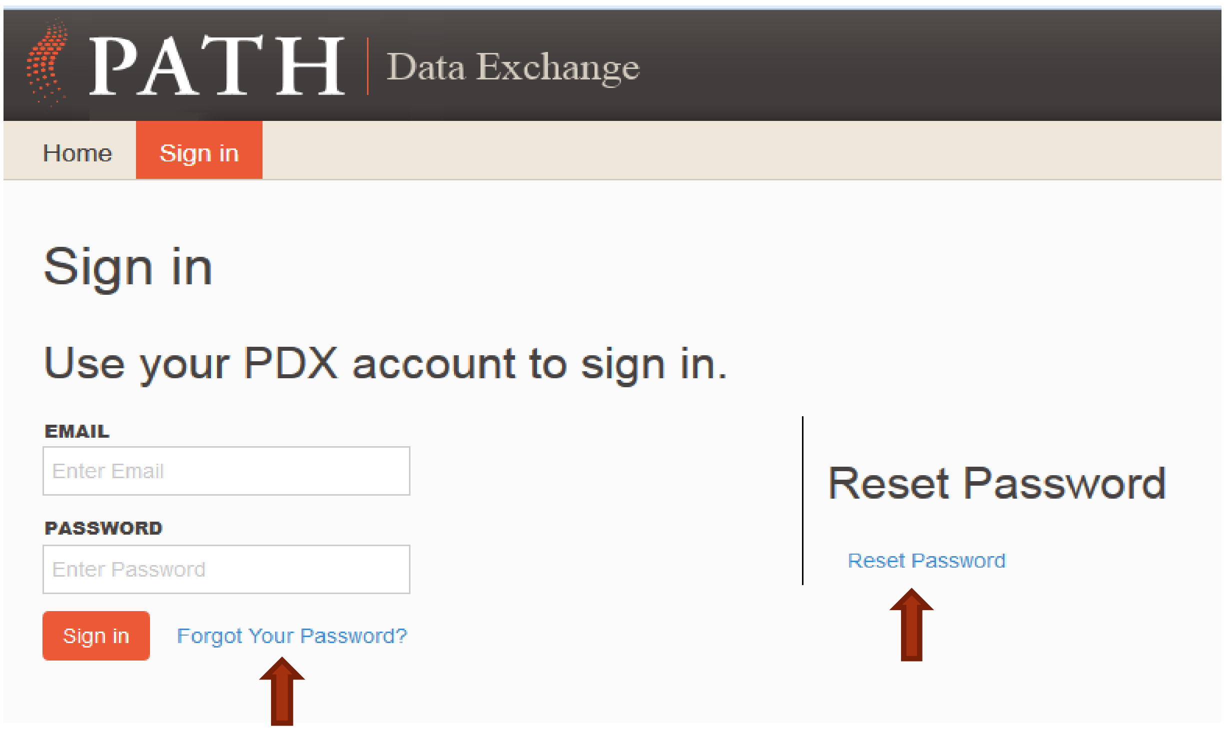
3. Enter your e-mail address and password for your PDX account into the respective fields, then click the orange "Sign in" button. **Passwords must now contain the following**:

- an uppercase letter (A–Z),
- a lowercase letter (a–z),
- a number (0–9), and
- a special character (!–*).

Forgotten Password/Reset Password

If you have forgotten your password, click "Forgot Your Password?" next to the orange "Sign in" button. This will bring up a page where you can enter your e-mail address. The system will then send you an e-mail with a link to reset your account password. If you do not receive the e-mail from PDX, then please contact your SPC for further assistance.

You will need to **reset your password every ninety days**. Use the Reset Password link to update your password. You will be instructed to enter your email address and an email will be sent to you with a link to update your password. Users will receive an e-mail with the subject "PDX Password Reset" and must use the link within 3 hours to gain access to PDX.



PROGRESS REPORTS IN PDX

COMPLETING PROGRESS REPORTS IN PDX

As noted in the “Overview” section of this document, PDX can be used to complete both annual reports for the PATH program as well as progress reports. SAMHSA only requires that the PATH Annual Report be submitted by all territories and states; however, many states and territories have found progress reports to be a valuable tool in improving their data collection and reporting efforts for PATH. If you are unsure whether you need to submit progress reports, then go to your SPC for guidance. Each SPC determines if a state or territory will complete the progress reports, and they must “turn on” the progress reporting function in PDX to allow PATH providers to submit this data.

If you do submit progress reports, then please be advised that there are two distinct types of progress reports available in PDX:

1. **Cumulative Progress Report:** Contains yearly cumulative totals to date. A provider’s final cumulative report may be used to populate their annual progress report.

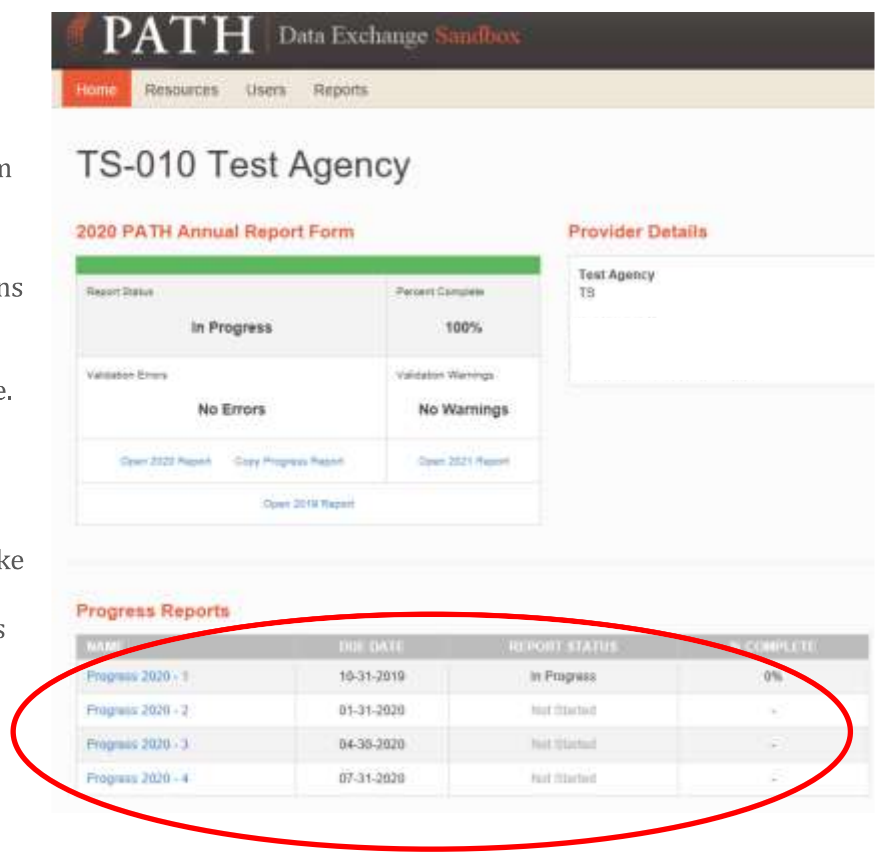
2. **Discrete Progress Report**: Contains data for discrete periods that do not overlap. **Note: this data cannot be used to populate the annual progress report.**

How to Complete your Progress Report in PDX

1. After signing in to PDX, you will be directed to your Dashboard. The progress reports will be visible on the home page toward the bottom left of the screen.

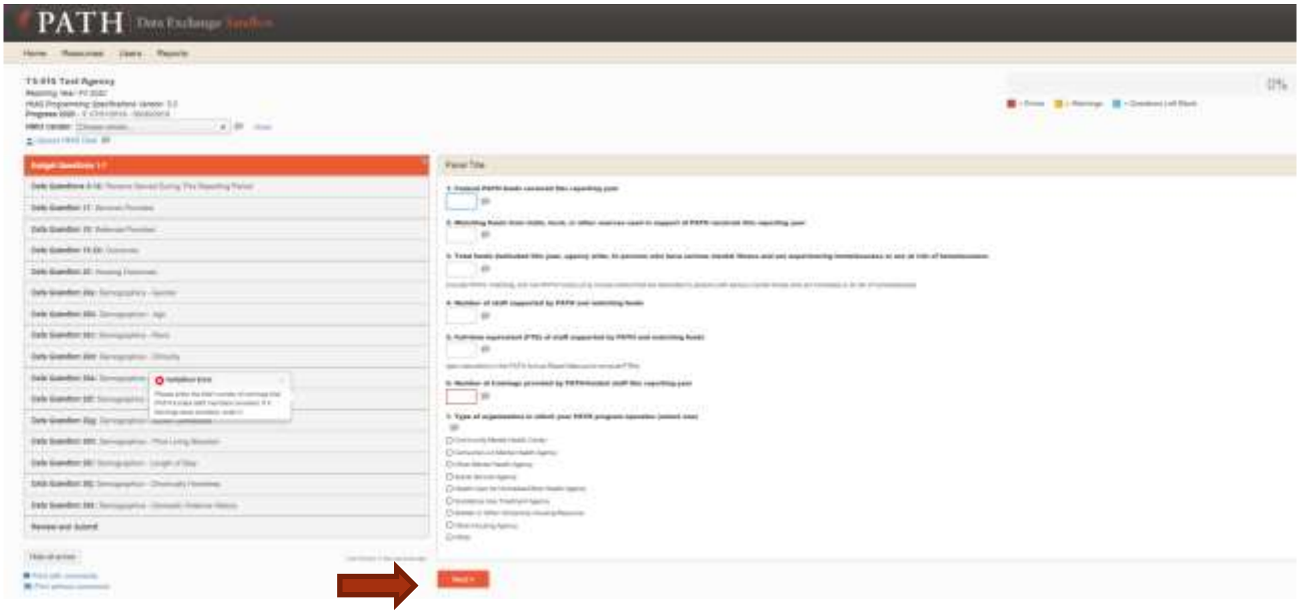
   Note: If the progress reports are not visible, then this means your SPC has not activated them in PDX. Please contact your SPC for further guidance.

2. Click the blue link under the “Name” column for the progress report you would like to complete, and you will be taken directly to the progress report form.



3. Use the navigation bar on the left side or the orange “Next” button at the bottom of the screen to move through the form and complete all fields. Once the form is 100 percent complete, you will be able to click the “Submit” button on the last page.

Navigation bar



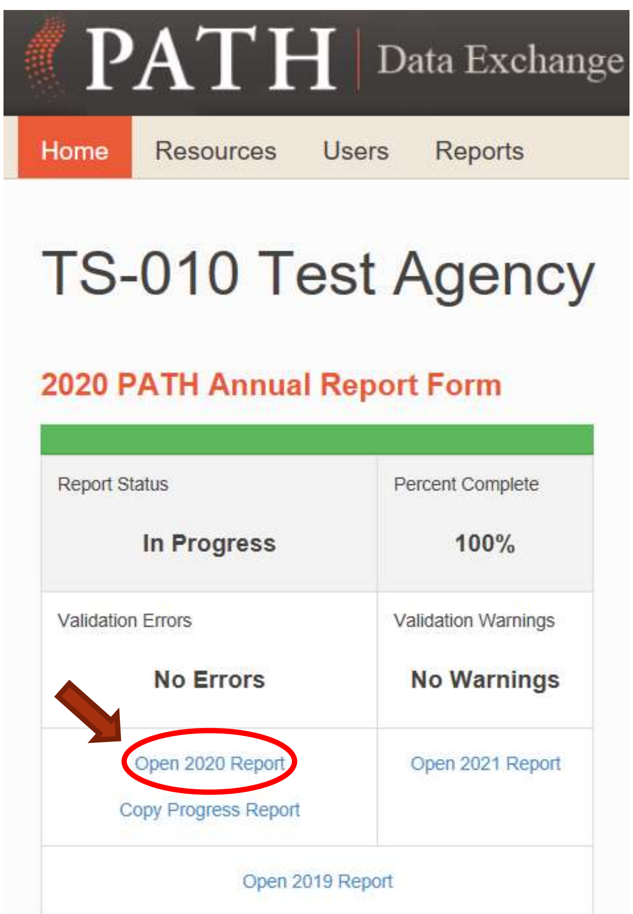
COMPLETING AND SUBMITTING YOUR ANNUAL REPORT IN PDX

PATH providers must submit their PATH Annual Report using the PDX website during the timeframe that is established by their local SPC.

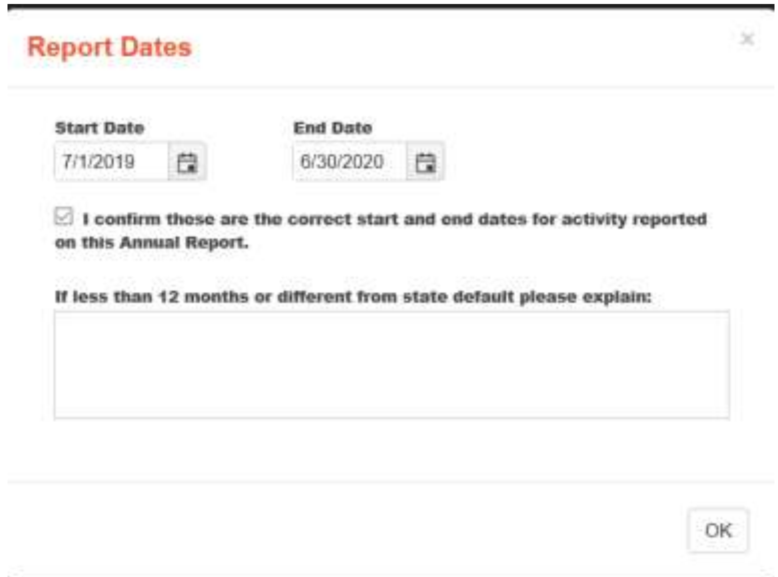
For the FY 2020 PATH Annual Report, SAMHSA requires that all PATH reports are submitted, reviewed, and approved by all SPCs by **Thursday, December 31, 2020.** SAMHSA will work with SPCs throughout the reporting period to ensure they are able to support their providers in the submission process. PATH providers should seek assistance with their PATH report from their SPC, to ensure that their SPC is aware of and able to assist with the challenges that they are encountering. SPCs can refer to *2020 PDX User Guide for SPCs*.

Completing your Annual Report in PDX (without Progress Report data)

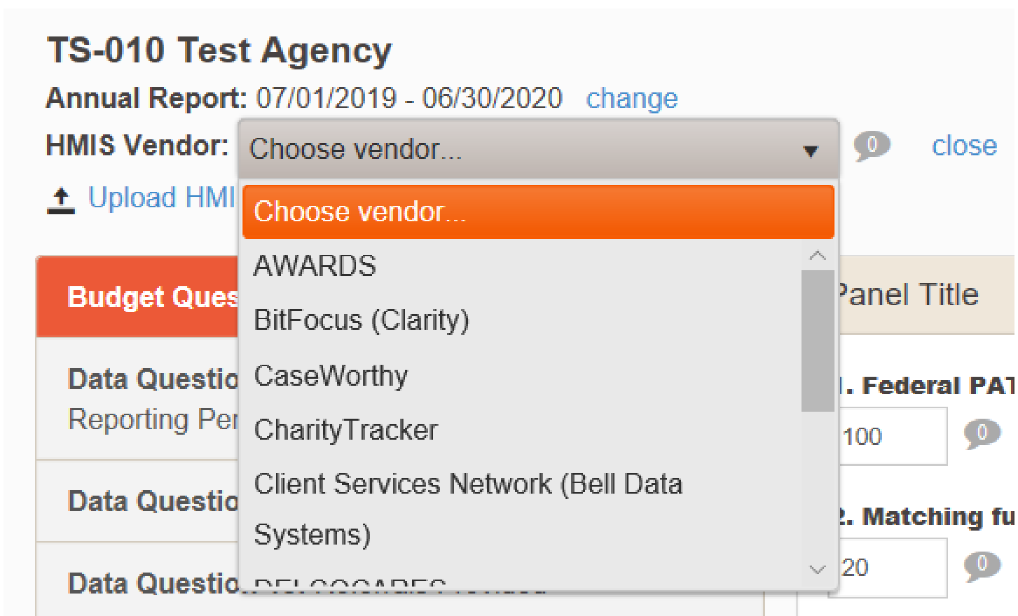
1. Log on to the PDX website.
2. On the PDX Dashboard, click the blue link labeled “Open 2020 Report” under the heading “2020 PATH Annual Report Form” on the top left side of the page.



3. The first time you open the PATH Annual Report Form, a box labeled “Report Dates” will appear. Confirm that the reporting period dates are correct or change them if needed. Once you have verified the dates for your Annual Report, click the checkbox to confirm the dates and enter a comment (only if applicable), then click the “OK” button in the bottom right of the box.

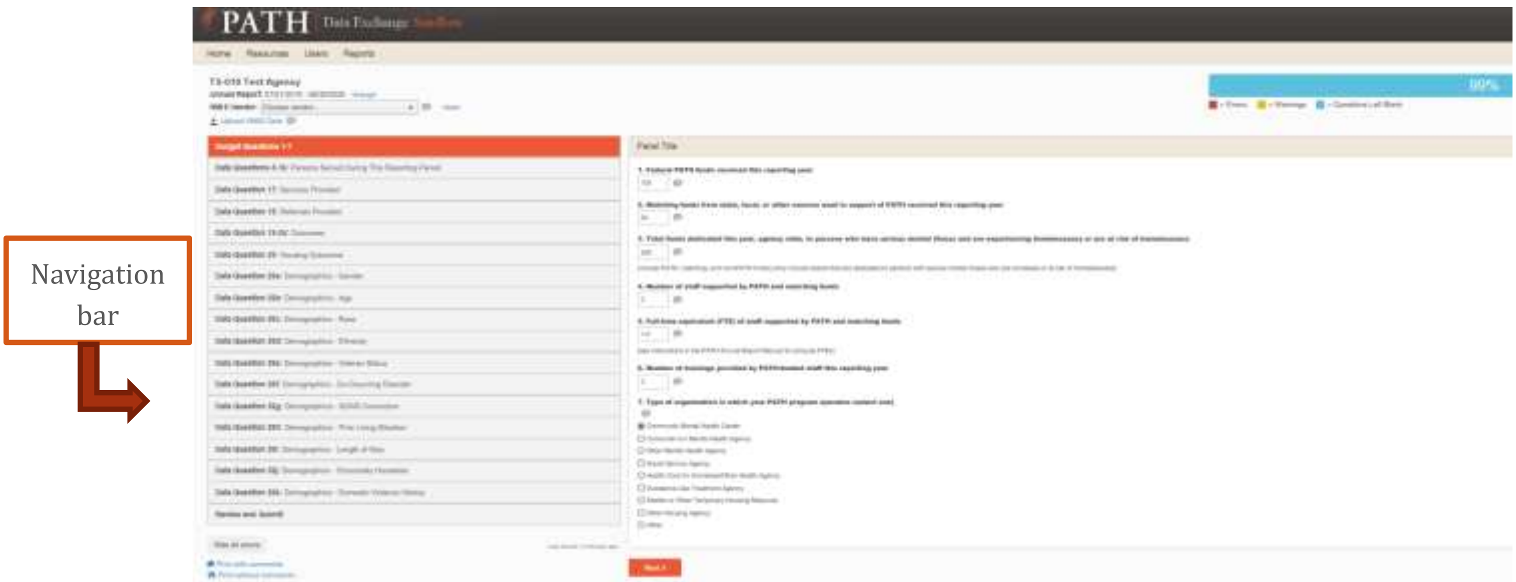


4. After you have confirmed your annual report dates, you will also need to select your HMIS Vendor. Choose your vendor from the drop down list. If your HMIS vendor is not listed, choose “other” and enter your vendor’s name.



ANNUAL REPORTS IN PDX

5. Once your report dates are confirmed and you have selected your HMIS Vendor, you can answer the questions in order and click the orange "Next" button at the bottom of the page, or you can fill out the questions in any order you choose by navigating to different sections of the report using the left-hand menu bar. To navigate to various parts of the report, please click the section you wish to see on the left-hand side of your screen, and the questions for that section will appear in the middle of the screen. **There is no need to press "Save" in the PATH Annual Report;** each response is automatically saved as soon as you enter it and move to the next field. The progress bar at the top will indicate how much of the report you have already completed. You can exit PDX and return at any time to continue working on your report.

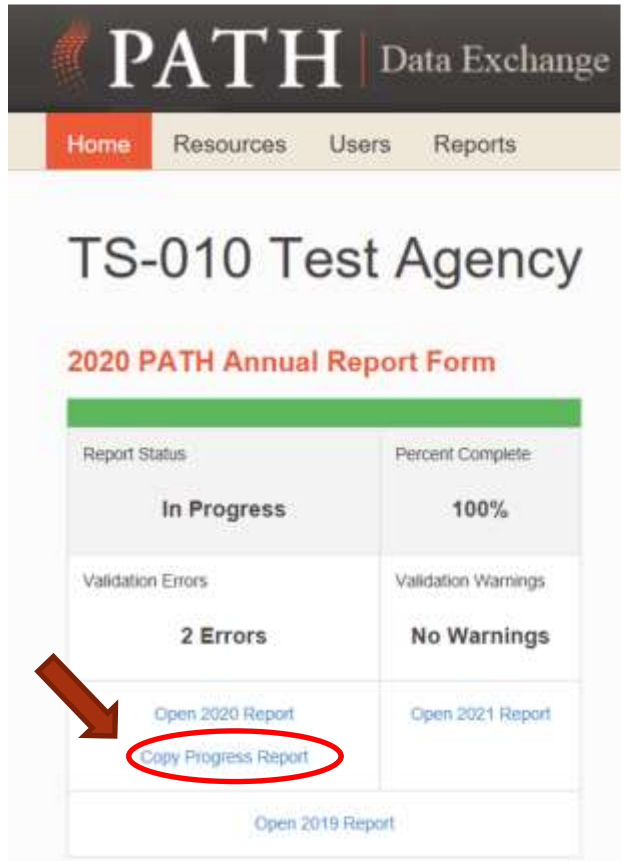


ANNUAL REPORTS IN PDX

Completing your Annual Report in PDX (with Progress Report data)

Reminder: This option is **ONLY** available to PATH providers who utilize the **cumulative** progress reporting function throughout the year. If you are not sure whether you use the cumulative progress report, please contact your SPC for further guidance.

1. Log on to the PDX website.
2. Select "Copy Progress Report" under the heading "2019 PATH Annual Report Form."



3. A pop-up box will appear asking you to confirm that you want to copy data from the progress report into the annual report. Any data that is already in the annual report form will be overwritten with the data in the progress report. To copy the data, select "Yes, Copy."

4. Next, a box labeled "Report Dates" will appear. Confirm that the reporting period dates are correct or change them if needed. Once you have verified the dates for your Annual Report, click the checkbox to confirm the dates and enter a comment (only if applicable), then click the "OK" button in the bottom right of the box.

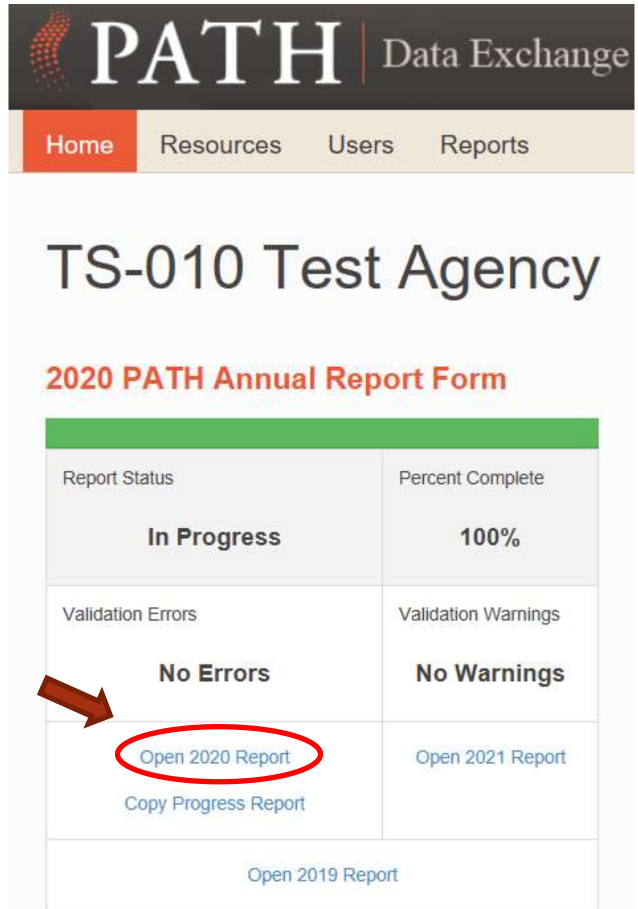
5. After you have confirmed you annual report dates, you will also need to select your HMIS Vendor. Choose your vendor from the drop down list. If your HMIS vendor is not listed, choose "other" and enter your vendor's name.

6. Once your report dates are confirmed and you have selected your HMIS Vendor, you will see the first page of the PATH Annual Report. Your data should be automatically populated from your cumulative progress reports.

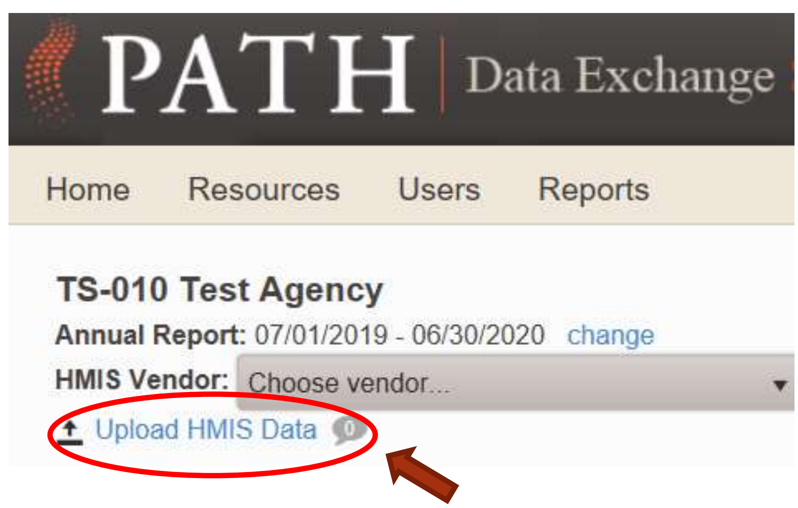
ANNUAL REPORTS IN PDX

Completing your Annual Report in PDX (with CSV Upload)

Starting with the FY2018 report submission, PATH providers have the option to upload non-identifiable data directly from HMIS into PDX through a comma-separated values (CSV) upload process. Once providers upload data in PDX using the CSV process, they will have a chance to update data if there are errors.

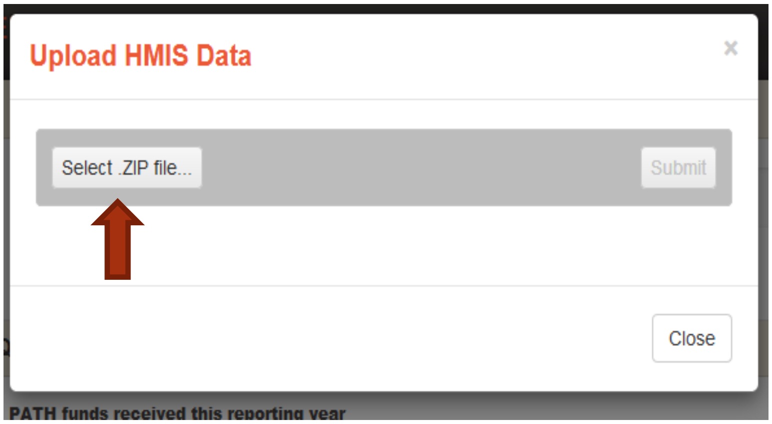


1. Run the CSV report from your local HMIS. If you do not know how do to this, please reach out to your local HMIS Lead Agency/Administrator.
2. Save the CSV file to your computer or local network.
3. Log on to the PDX website.
4. On the PDX Dashboard, click the blue link labeled "Open 2020 Report" under the heading "2020 PATH Annual Report Form" on the top left side of the page.
5. Next, a box labeled "Report Dates" will appear. Confirm that the reporting period dates are correct or change them if needed. Once you have verified the dates for your Annual Report, click the checkbox to confirm the dates and enter a comment (only if applicable), then click the "OK" button in the bottom right of the box.

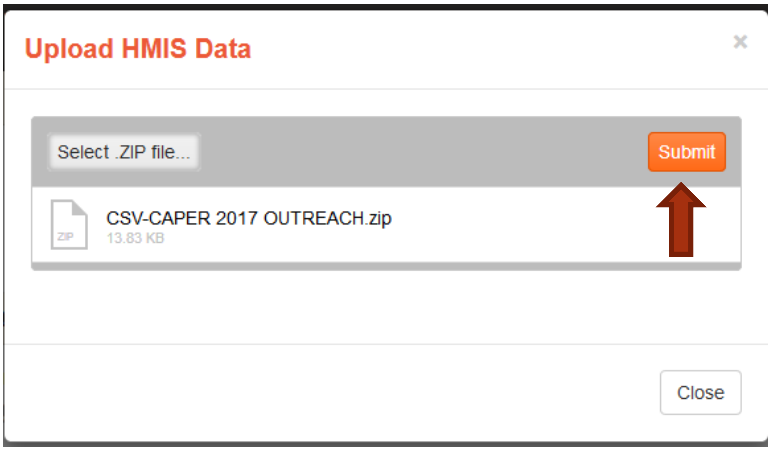


6. After you have confirmed you annual report dates, you will also need to select your HMIS Vendor. Choose your vendor from the drop down list. If your HMIS vendor is not listed, choose "other" and enter your vendor's name.
7. To upload CSV Data, click on the "Upload HMIS Data" link.

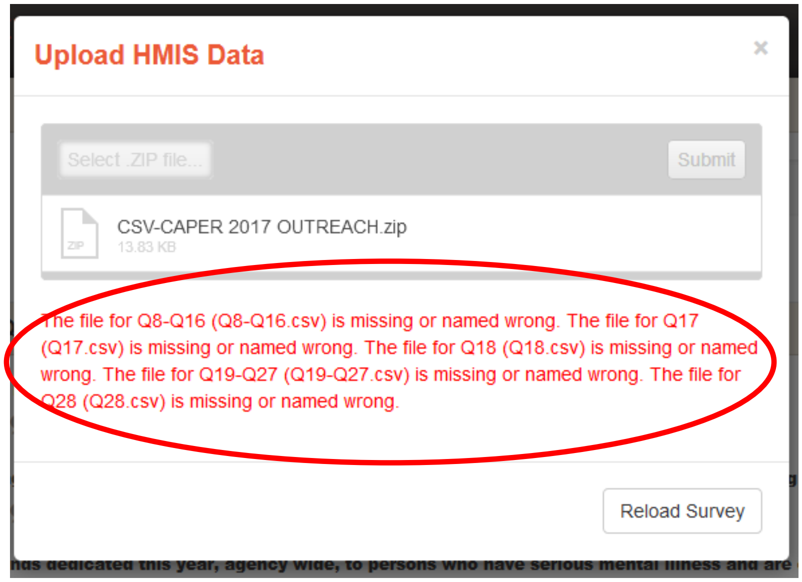
8. A pop-up Upload HMIS Data box will appear. Click on the Select .ZIP file to search your files for the CSV



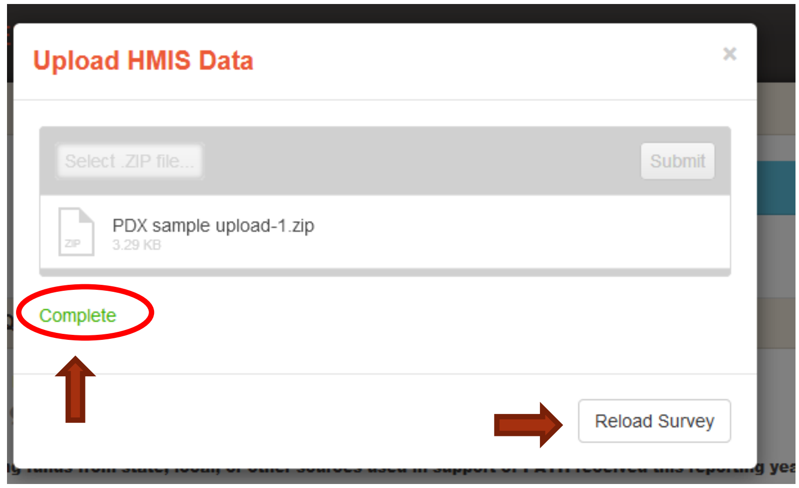
9. Select the CSV file and then click on the orange submit button.



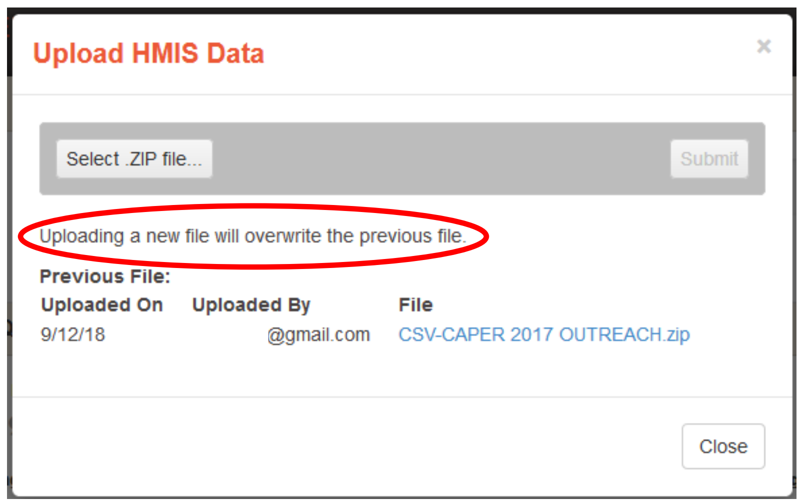
10. If your ZIP file has errors, you will receive a message similar to what is shown below. However, you can "Reload" the survey and then make any updates manually as necessary.



11. A successful upload will include a green “Complete” in the box below the CSV Zip file and will look like the screenshot shown below. Click on the “Reload Survey” button to complete the process.



12. You may re-load a new CSV at any time, but it will overwrite the previous file.



13. Keep in mind that budget questions 1-7 are not collected within HMIS and therefore those questions will still need to be completed manually.

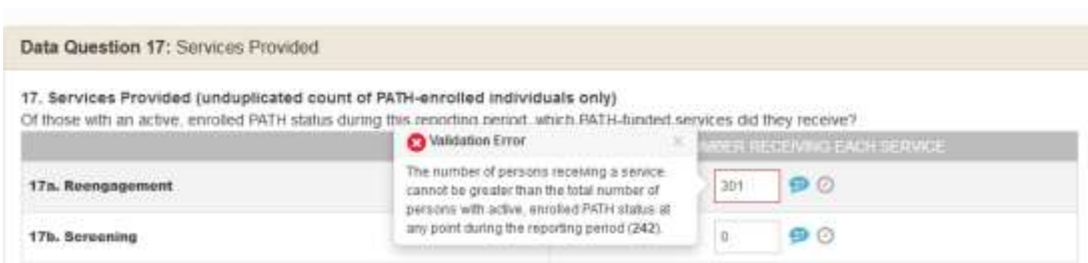
14. Once that is completed, you will see the first page of the PATH Annual Report. Your data should be automatically populated from the CSV file that you uploaded.

Submitting your PATH Annual Report

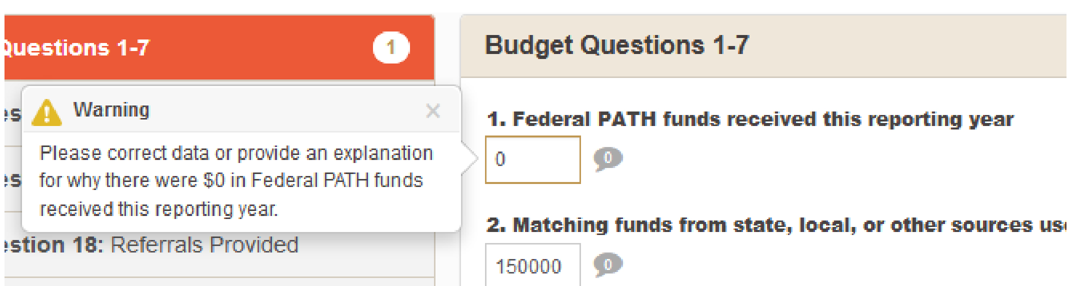
> For the FY 2020 PATH Annual Report, providers do not have the option to submit estimated data. All elements must be completed with actual data that is generated from your Homeless Management Information System (HMIS).

1. If you have an answer that appears to be incorrect or does not match other answers, a “Warning” or a “Validation Error” box will appear next to the question. The warning or validation error message will provide more information about what needs to be corrected. You can choose to correct warnings or validation errors immediately or continue filling out the report and return to make corrections later before you submit the report.

   To correct a validation error: Validation errors indicate that the number entered does not align with the logic of the report form. Review the text of the error to determine what needs to be changed. **The report form cannot be submitted until all validation errors are corrected.**

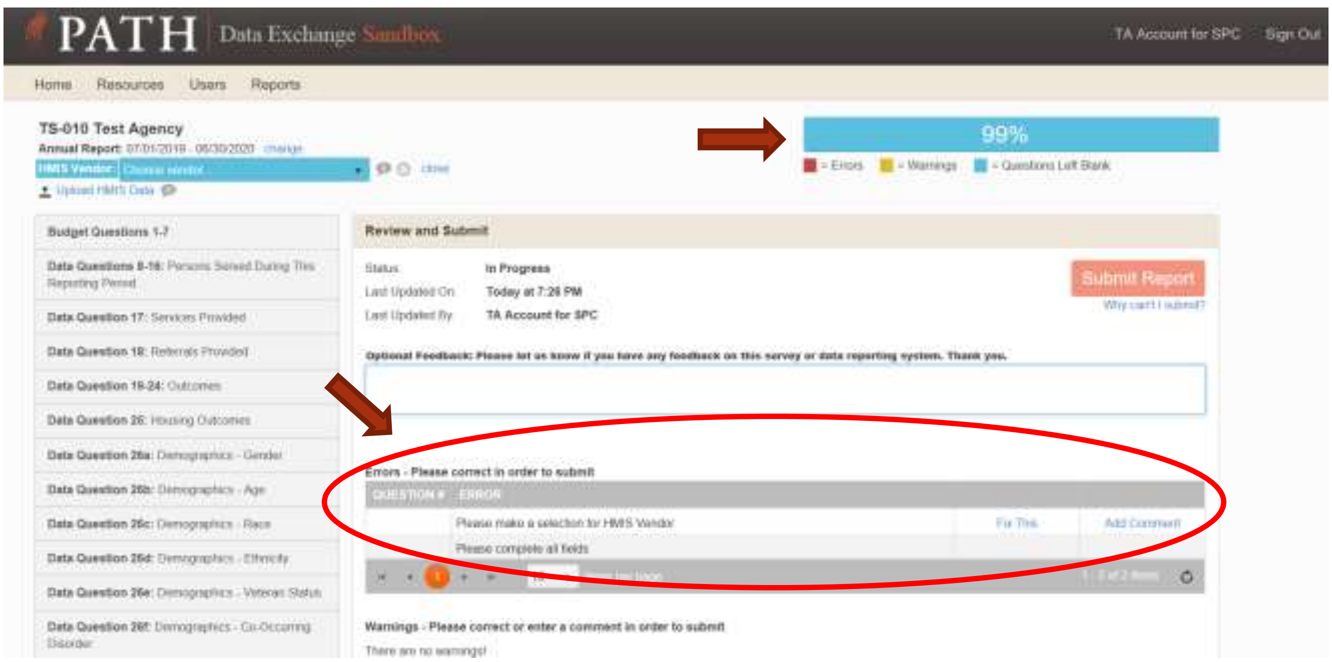


   To correct a warning: Warnings indicate that the data entered is unusual for a typical PATH program or that your agency’s data is significantly different than the previous year. Review the data to ensure that the number entered is correct. If the number is correct, enter a comment for this data element to provide an explanation of why this number is correct. **The report form cannot be submitted until all warnings are corrected OR a comment is entered for each warning.**

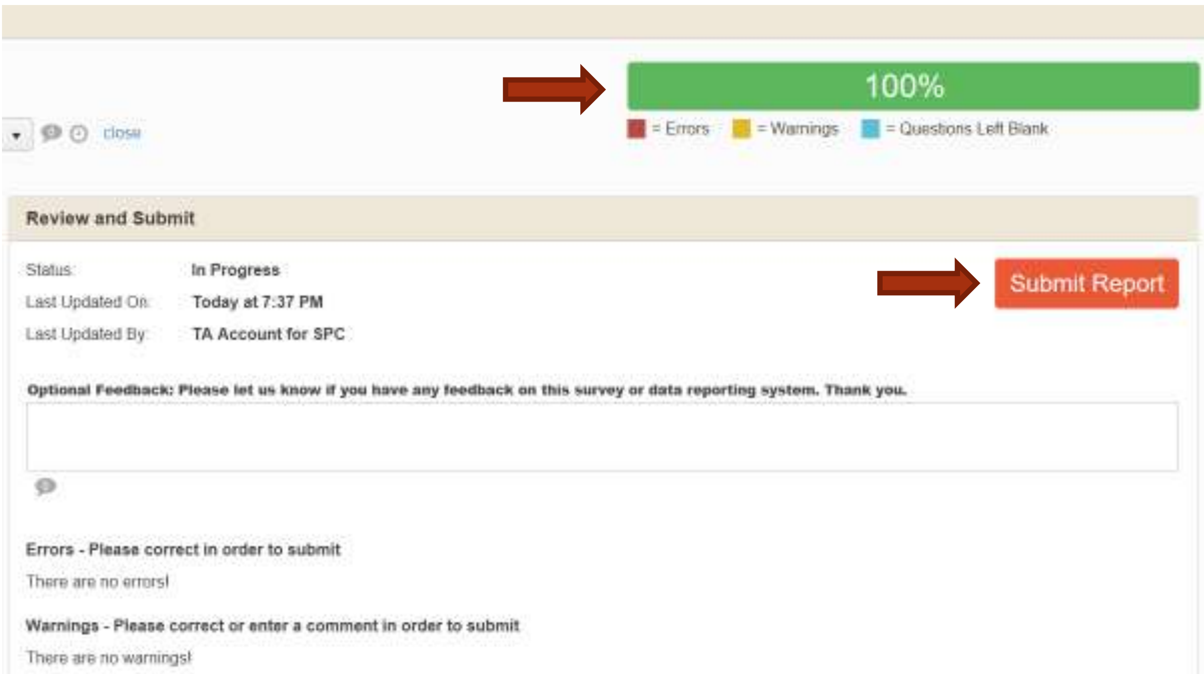


2. Fill out the answers to each question in the report until the progress bar at the top of the screen displays 100%. A validation error is automatically generated for a report until the progress bar displays 100% to indicate that a report cannot be submitted until all fields are completed. For the report to be fully completed, a number must be entered for every required data element. If the response to a data element is zero, a "0" must be entered for this element; it cannot be left blank.

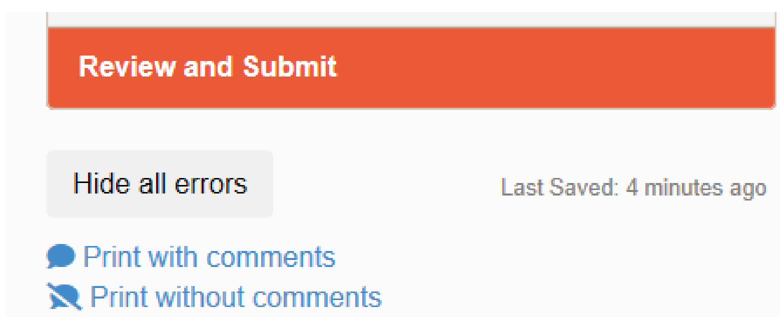
3. On the submission page, you will see a list of any validation errors or warnings that have not yet been corrected. **You will not be able to submit the report until you correct all validation errors and address all warnings.** Click on the "Fix This" link to be taken to the response that needs either corrected or a comment.



4. Once you have answered all questions in the report (the progress bar displays "100%"), click the "Review and Submit" section at the bottom of the left-hand menu bar.
5. Once all answers are entered and you have resolved all validation errors and warnings, you will be able to click the large orange "Submit Report" button on the top right-hand side of the screen to submit your report.



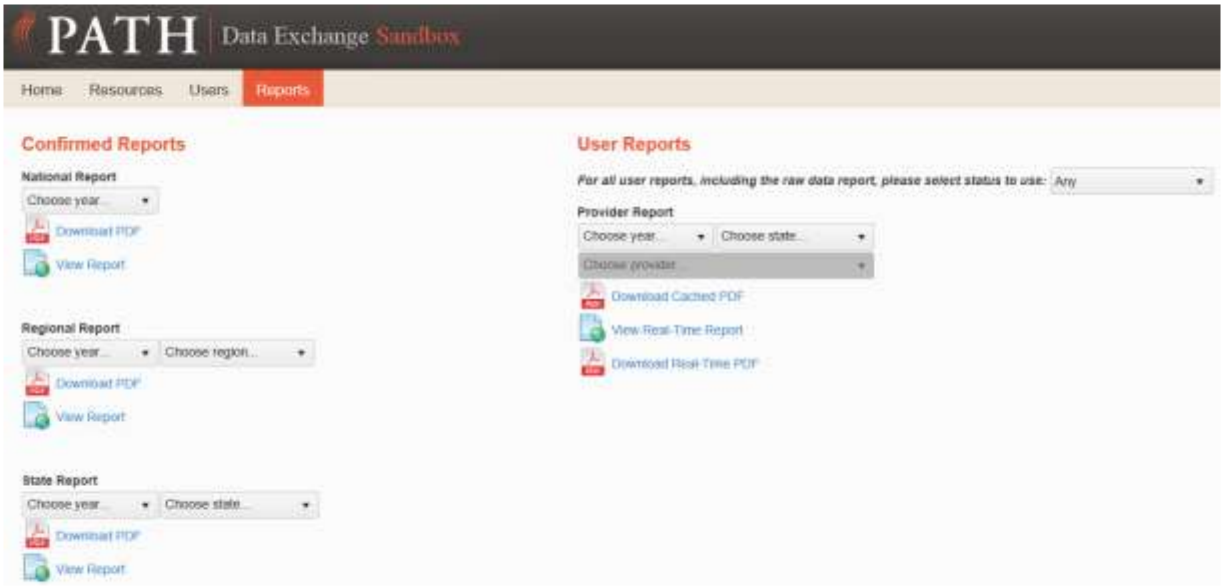
After your submission, or at any time during your work on the report, you can print a copy of your report, with or without comments, by clicking the two options on the bottom left side of the screen.



6. Once you have submitted your report, it will be reviewed by your SPC and approved or returned to you if changes are needed.

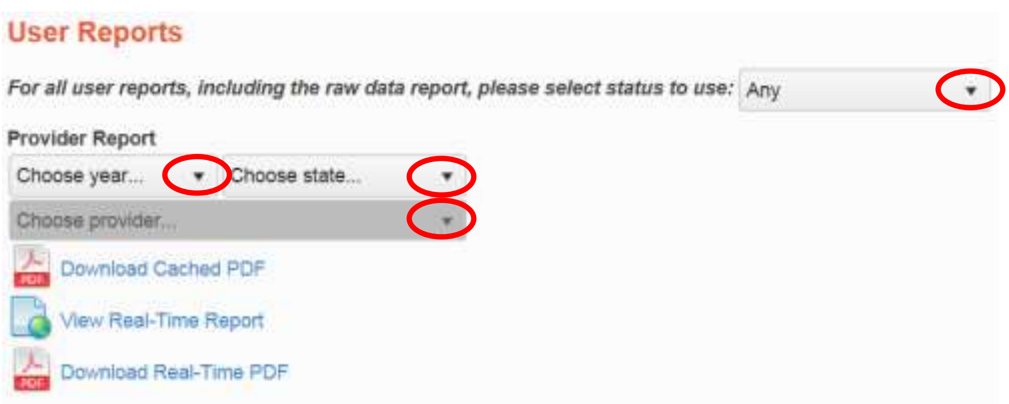
REPORTS IN PDX

Providers may download **National**, **Regional** and **State Reports** that have been confirmed for publication. Providers may also download their own individual **Provider Report**.



To download **User Reports**, use the drop-down menu to:

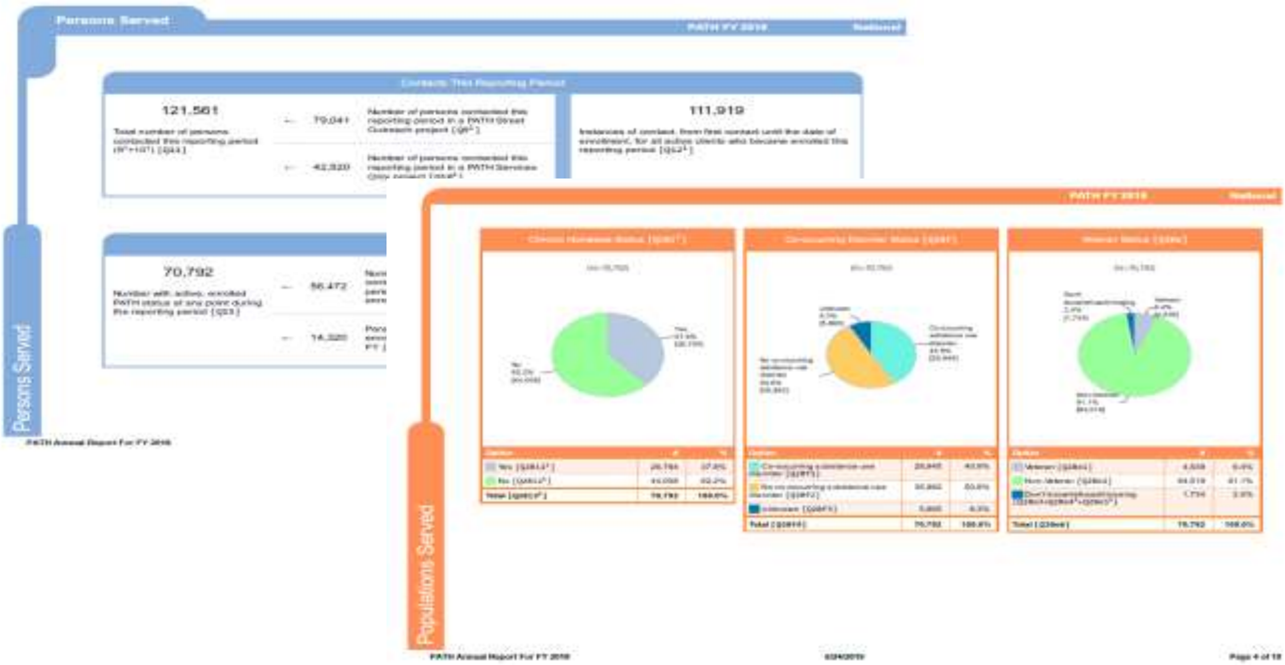
1. Choose the status of the report you want to download
2. Choose the year of the report
3. Choose the state and the provider



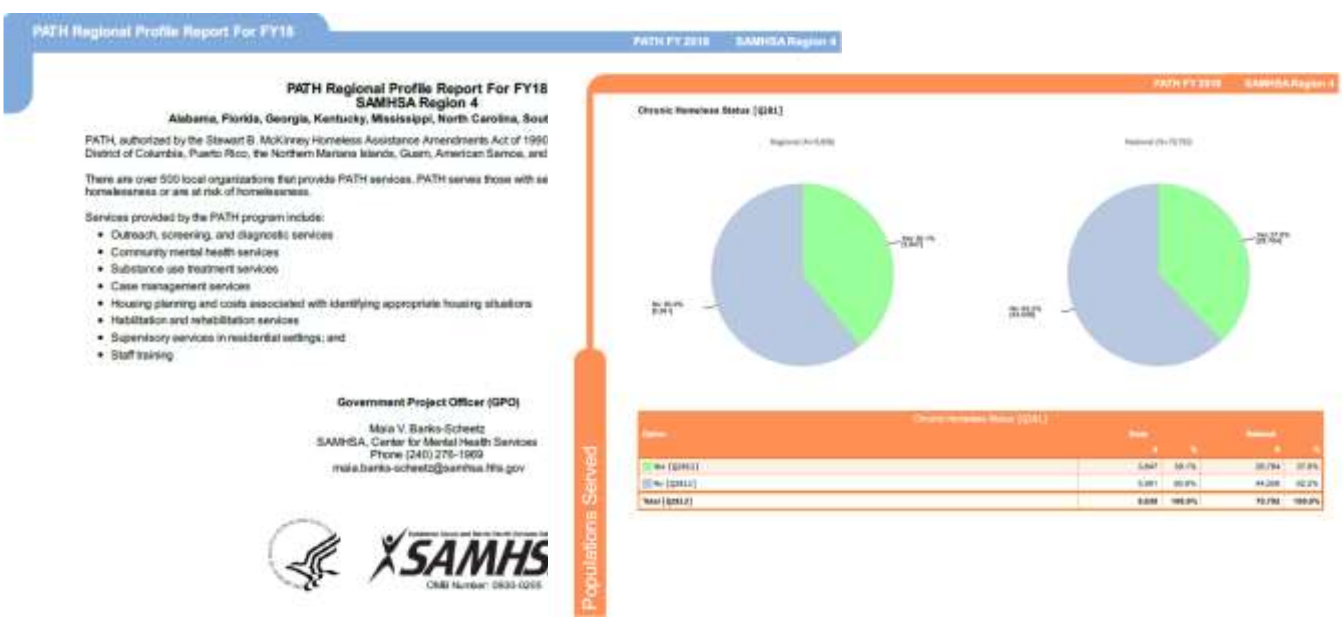
REPORTS IN PDX

Confirmed Reports have been released for FY2016, FY2017, FY2018, and FY2019.

- **National Report** contains national aggregate information for each question.

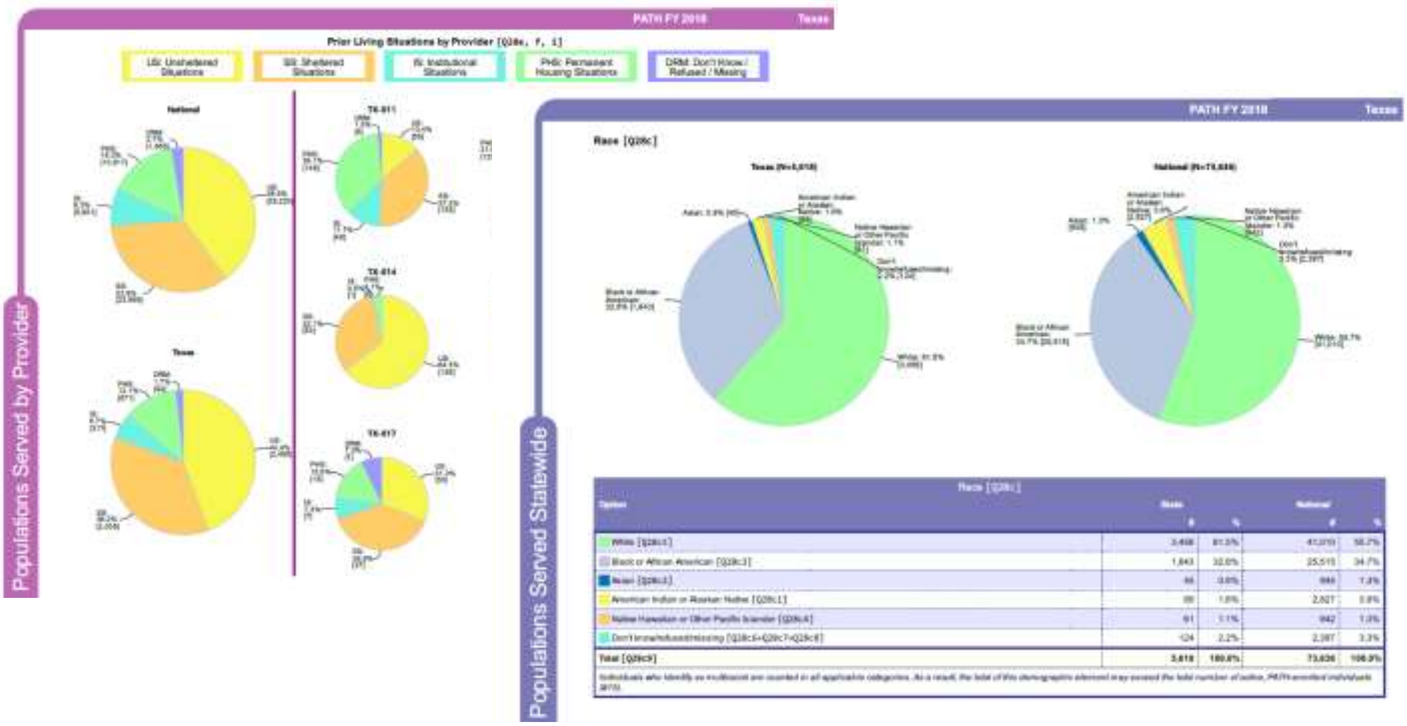


- **Regional Report** contains aggregate information for each of the ten regions and makes regional to national comparisons.



REPORTS IN PDX

- **State Report** aggregates information for each state, provides national and individual provider comparisons for each question, and looks at outcomes.



- **Provider Report** contains report data for each provider for each annual report question.