PATH Projects for Assistance in Transition from Homelessness

PATH Data Reporting for State PATH Contacts (SPCs)

NOTE: This webcast was presented to SPCs but the transcript is provided SPCs and Providers. If you are a Provider please contact your SPC for information about the nuances in your state.

Webcast 11/18/09

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Introduction and Welcome by Laura Gillis

The PATH Technical Assistance Center provides training and support to SPCs in all 50 states and 6 territories and over 480 PATH providers. Our work includes training, technical assistance, publications, and online learning opportunities, like this webcast. I would like to make a couple of logistical announcements. First, all of you will remain on mute for the duration of the webcast so we can all here the presentation. We will take questions at the end of the presentation. To submit a question you can submit it in the Q&A box on the left side of your screen. There is a pod that says Chat Q&A. We will try to address as many questions as we can. I will now hand the presentation over to SAMHSA's PATH Director, Dr. Mattie Cheek, who will say a few words about SAMHSA, PATH, and the importance of PATH data.

Introduction and Welcome by Mattie Curry Cheek, PhD

Thank you, Laura.

Good afternoon everyone and thank you for attending this webcast. As Laura said, I am from SAMHSA, the federal agency that funds the Technical Assistance Center, all of the PATH programs across the country, and the providers who then apply for funding through their PATH programs. The PATH program, through its legislation, requires that all states submit Annual Reports to SAMHSA, the federal agency. These reports are submitted every year by January 31st. I cannot stress enough the significance of having your reports in on time. When we report to the Office of Management and Budget, the agency that reports directly to the President, the data that represents what we, meaning all of us, are doing around the country.

You will be given some information later on by Rachael, who will do the presentation, on what is required for providers to submit data. These reports are extremely significant because it lets congress know how much we are doing using PATH funds. It lets us know, for example, how many people we are serving, how many people we are contacting, how many of them are veterans, how many people are receiving mental health services, and substance abuse services, and so on. All of the different data tables that you will submit your data in, all of that data will be important for us to let congress know what we are doing. Our funding is dependent upon how well we do and how well we are able to submit this data and show that we are absolutely increasing the amount of people that we are contacting. If you are finding that you are not contacting as many people as before please try to find out what is going on. Do you need some support? Do you need technical assistance to make sure that the numbers are up? As soon as providers know that they may have difficulty reaching the January 8th deadline, I need you to let your SPC know that very quickly. There will be some changes to the reporting this year and Rachael will talk more about that later on. Again I appreciate your attention, your time, and your cooperation in getting your data to us in a timely fashion. Thank you. I will turn it over now to Rachael.

Rachael Kenney

Thank you, Mattie.

This is the agenda for today. We are going to start by showing you how to access the PATH Report. This is a little different this year now that we have a new website. We are going to talk a little about the structure of the PATH Report. The structure has not changed from previous years. We are going to talk about the changes to the PATH Report, some reminders, and the future of PATH Reporting. We are going to leave plenty of time to get to your questions.

In order to access the PATH Report, visit the PATH website. You can see the address up on your screen (http://pathprogram.samhsa.gov). Click on the tab that says “Data.” When you click on that “Data” tab there is going to be a button that says “PATH Reporting.” When you click on that “PATH Reporting” button it will bring you to where you login with your provider id and password. You do not want to log in at the top of the PATH website with your provider id and password. If you try to do that you will get a message that lets you know where you need to go in order to sign.

As I mentioned before, the structure of the PATH Report has not changed at all. It begins with the budget information. Then it has information about the persons served followed by the available services and demographics.

I am going to start by talking a little about changes to the 2009 PATH Report. This first one is I think going to be very exciting and well accepted. We recently had it approved for PATH Providers to be able to report on all persons served and not just the federal percentage of persons served. For those providers who had to calculate the percentage of their funds that are federal funds and then use that percentage for every question in the report they no longer need to do that. They should be reporting on every single person who is enrolled or served by PATH, depending on the question. That calculation is no longer relevant. What this also means is that if your program is 100% MATCH funded you will now need to fill out the report or you'll need to submit their data under another provider. If you have specific questions about how to make that happen in your state I encourage you to contact your SPC (if you are a SPC please contact the PATH Technical Assistance Center).

Another change is that we are encouraging providers to report on actual numbers of persons served rather than estimates. This is not required. Providers can still check off that it is an estimate but if you are providing an estimate we encourage you to provide the rationale for how the estimate was calculated in the text box on the B Table of the report. The reason why that we'd like you to provide rationale is that we want to see what kind of logic PATH Providers are using when they are determining what their estimate is.

There is also an additional section to the report this year, the Voluntary Outcome Measures. There are five Voluntary Outcome Measures that were added to the report this year. They are completely voluntary and are not required at all. If providers are selecting that they are not reporting them they must click off "Not Reporting." If they are reporting them they are asked to fill in the number of persons who were assisted and there is also the option of reporting the number of persons who actually received the service. You should have seen discussion about these Voluntary Outcome Measure before. There are detailed definitions in the reporting guidelines and they have to do with the number of persons assisted in obtaining housing services, primary medical care, medical insurance services, increased earned income, and income benefits.

And another change to the report this year is to the Race/Ethnicity question. The response categories for this question have changed slightly. This is due to how Race/Ethnicity is counted across different programs in SAMHSA and within the government. The option to select "other" is no longer allowed. The option to select "two or more races" was added. When filling this out it is important to remember it is based on the consumer self-report. If the consumer states that they are Hispanic then they would be counted under Hispanic. If the consumer said that they were Hispanic and White they would be counted under "two or more races."

The deadline for Providers is January 8, 2010. The SPCs are welcome to change that deadline and make it earlier so if you are a provider please confirm the deadline with your SPC. As Mattie stated, the PATH Reports are required by the PATH legislation to be complete by January 31st. We are encouraging SPCs to complete their review of the reports by January 22nd so we'll have a whole week to work with SPCs to iron out any problems. If you are unable to complete the report by January 8th, for example if you have your state report on a January to December reporting period, please let us know so we don't start calling you and harassing you after January 8th and we know when to be concerned about your provider reports.

Just a few reminders. These are the same as last year. For Table C, item Cd, include the number of people successfully connected to community mental health services (CMHS) as direct result of the PATH program in addition to people receiving CMHS that are paid for by the PATH program. This is the only question in Table C where the persons who are successfully connected to the service are counted. The reason for this is that one of the measures of the Offices of Management and Budget holds us to is the percentage of persons enrolled in CMHS. They are not specifically looking for CMHS paid for by the PATH program, but they are looking at CMHS as in how many PATH consumers are we getting into them.

Another reminder for Table C is that you must indicate the funding source. Specify whether the item was 100% PATH funded, partially PATH funded, provided but not PATH funded, or service not provided. If the service was 100% or partially PATH funded, enter the number of persons who received the service. This number of persons cannot exceed the value entered in B3 of the report, which is the total number of persons enrolled. For all questions in Table C, it's based on the total number of persons enrolled so it can not be larger than item B3. If the service was provided but not PATH funded or the service was not provided enter zero in the box when filling out the report.

For Table D, the demographic information is reported only for consumers who are enrolled. This means that, again, each question cannot exceed B3, and each question must add up to B3. The exception to this is question D8 which is the length of time homeless. This question is based on those persons who are considered literally homeless which means that D8 must add up to D7a, the number of persons living outdoors, and D7b, the number of persons who are living in short term shelter.

We wanted to take a minute to tell you about the future of PATH Reporting. We've been talking a lot about changes that are coming down the road. We're looking at is coming up with more consistent definitions. We began with last month's webcasts hosted by Hank and Monica where we talked about the definitions that the PATH Administrative Workgroup have come up with. These definitions are strongly encouraged, but we can not require them at this time (to listen to a podcast or view the transcription and slides from these webcasts visit http://pathprogram.samhsa.gov/Resource/PATH-Webcast-Resource-National-Definitions-46982.aspx).

We are looking at moving towards client-level data collection and reporting. Currently the PATH report is an aggregate report, but we know that most providers are already collecting client-level information, whether that's in a Microsoft Excel spreadsheet, Microsoft Access program, in HMIS, or some other way. Providers are collecting that client-level information and we'd like to explore ways to begin to have that submitted at the national level, completely de-identified. If we can collect that information at the national level, but not know who the people are, we can get more rich information about what PATH is doing and who PATH is serving.

And the last thing that we are looking at moving forward with on the PATH data and reporting is having more outcome driven reporting. As of right now we are collecting more of outputs rather than outcomes. We know that, in looking at other federal programs, programs that are able to show strong outcomes for their consumers are the programs that are getting more funding and are considered more successful. So we'd like to start to move PATH in that direction with more outcome based reporting which is why we've added the Optional Outcome Measures this year. The vision is that at some point, not now, that those Optional Outcome Measures would become mandatory and we would be able to report that information at a national level.

We wanted to make sure that the majority of today's call was spent on answering your questions. I believe Laura will be moderating the questions.

QUESTIONS:

Will I be receiving my Providers ID's and Passwords via email this year? I received them last year but have not received them yet this year. Where can I access them?

Melissa Martin

[SPCs] The IDs and Password are available on the PATH website by going to the "Grantee Resource Center" then "Managing Your Providers." The details were also sent in an email that went out to all of the SPCs explaining how to access that. So, you will not be receiving them via Email and you can certainly contact the PATH TA center if you are having difficulty accessing them. Also, we want to remind everyone to only send out the IDs and Passwords to each provider individually because sending them out all together sometimes causes some confusion.

[Providers: Please contact your SPC for your ID and password]

Will the PATH TA be instructing the Providers about changes in the report?

Rachael Kenney

[SPCs] The PATH TA center is holding a webcast for providers tomorrow also at 12 eastern time. Any provider who had been indicated as reporting - on the manage Providers page of the SPC Resource center has receive this information. We don't know if these email addresses are accurate because the SPCs are the ones who update them. So if you have not updated your providers on the SPC Resource Center recently, I would encourage you to send out the information about tomorrow's webcast and encourage them to attend. In this years report, they will need to read a page about what the changes are before they access the report. So they'll see it there. We encourage you to contact your providers and let them know that you are aware of these changes and assist them with questions that they have.

I use the fiscal years for reporting. This December, I will enter SFY09 data. Do you consider this active 2008-2009 or active 2009-2010?

Rachael Kenney

It sounds like Charley has used the federal fiscal year for reporting in the past and this year he is going to use the state fiscal year instead. Charley, I would encourage you to get in touch with me after this call. When we change the reporting dates, we try to accurately represent all of the months that went by. It sounds like we may be duplicating a few months or missing a couple of months. So, please contact me directly and we'll figure out how to best do this for you. [NOTE: Please notify your SPC if changing your reporting dates. SPCs please notify the PATH Technical Assistance Center if provider dates are changing].

How do SPCs show that we have reviewed the report?

Rachael Kenney

There is not a step that SPCs need to go through to indicate that they have reviewed the report. The PATH Technical Assistant Center does extensive data checking after the reports are complete and we communicate with the SPCs about this. So it's our assumption that once the reports are complete and the date for SPCs to review them has passed, we assume that the SPC has reviewed the report and we will get back to you with any questions.

In Section C, Questions CD1, if a local PATH provider is not a component of a Mental Health Center but is links and enrolls clients with community mental health services, should the answer to this question be zero?

Rachael Kenney

If they are linking consumers to community mental health services and they have that information about how many people they linked, they should be counting that. The logic behind this is that the PATH worker is spending an extensive amount of time working with people to get them connected with services so we want to be able to capture that. In this case where the PATH worker is connecting people to services but the services are in a completely different agency, when you are indicated the funding information, you would indicate that it was partially PATH funded. It's the outreach workers time that you are funding but you're not funding the community mental health service itself.

Can we review the dates and the federal fiscal year for this report?

Rachael Kenney

The dates that the data is reported varies by state. We would encourage states to have their Providers to report on the same dates they reported on in the past, unless there's some reason you would like to change it. If you are going to change your reporting dates, like Charley, please get in touch with me to figure out how to best capture the data and how to most accurately report it. You can see which dates were reported on in the past by reviewing the reports that were submitted in previous years by going to the SPC Resource Center, choosing PATH Report, and you can select each of your Providers from the drop down menu, there.

Who can access the Annual Reports from the PATH Providers?

Rachael Kenney

The only people who can access the reports of the Providers are the SPCs, the PATH Technical Assistance Center, the PATH Government Project Officers, and the Director, Mattie, can access them also. If you are a SPC and have someone who you would like to also give access to (for example, if you have an Alternate State Contact or I know in Florida and California there are a lot of regions and sometimes you'll have people who manage the regions) please have them register on the PATH website. Send us an email and CC them with their username and we can give them access as well. In order for anyone to have access to view the reports, they need to go through the SPC Resource Center so we can limit access to only to people who are appropriate.

To access the report to enter information you need to have that ID and Password that the states will be distributing. So, ideally you would just be distributing that only to the person at the Provider who would actually be filling out the report.

How do you download the report?

Melissa Martin

I'd like to bring your attention to: There are some files up in the meeting room right now. It's to the left of the PowerPoint slides. It's called "PATH Reporting Files" The 3rd one down is called "Annual Report Screen Shots". That's a copy of the report. A hard copy of the report. The link to this was also sent out in an email that you received last week. So that's how you can download the report. Do you have anything else to add about that, Rachael?

Rachael Kenney

Sure. These files are available to SPCs on the SPC Resource Center if you go to the "PATH Resources" page. They're at the top of the page. The 3 files that are available right now are the Instructions, the Possible Errors (we will be updating this file and will let you know when we upload it on the Resources center when that's complete) and the Screen Shots which we were just speaking about. Those are all available on the State Contact Resource Center and providers can download them when they login to the report.

Going back to the change from reporting all persons served and enrolled. To me, all persons served is not necessarily persons enrolled. Would you include persons whom the PATH workers

contacted but not necessarily enrolled? We would like further clarification on enrolled vs. served.

Rachael Kenney

That's a good opportunity for us to talk a littlie bit more about the difference between enrolled and served. The webcast that the PATH administrative workgroup held last month talked a lot about when you enroll someone and the transcript of this webcast is available by going to the PATH Website and selecting "Topics" and then "PATH Webcast Resources." You can get the transcript there. The audio and the PowerPoint will be available there shortly. If you look at the report, in the B table there are questions about the number of persons contacted. Yes, you would be counting all persons contacted there instead of the federal percentage of persons contacted. Reporting on all persons served doesn't change the fact that the C and D tables of the report are based on persons enrolled, only. So, only persons enrolled would ever be counted in the C or D table of the report. If you have enough information about the persons who are not enrolled but are contacted, that you would be able to include them in the entirely of the report, you may want to reconsider when you are enrolling someone in PATH. If you have all of their demographic information and you have information about the services they are receiving, they probably should be enrolled and not just counted as contacted. I would encourage anyone who has questions about that to get in touch with us so we can help you think through how you may want to change those definitions at your state.

Are the optional outcome measures going to be appearing on next year's annual report? Will we be seeing those for the foreseeable future?

Rachael Kenney

You will be seeing those optional outcomes for the first time this year. They are in the reports that you Providers may already be entering information in. We know we added them in the middle of the year so it's not expected that all provider will be entering that information. Those are outcomes or questions that many Providers and SPCs that we've spoken to are already collecting. They will not be required next year either.

Is it recommended that SPCs attend the Provider Webcast? Or is the content going to be the same as today?

Rachael Kenney

The content for the Provider Webcast will be the same as today, but when we answer questions we will be answering technical question about how to fill out the report. If there are any questions that may have variations at the state level, in the demographics table specifically – a number of those questions are defined at the state level. For example, with serious mental illness, some states would consider traumatic brain injury, or TBI, a serious mental illness and some states would not. The PATH Technical Assistance Center doesn't have access to all of those state-level nuances so we would be asking your Providers to follow up with you if they have questions along those lines.

I also wanted to bring up one other reminder that I failed to mention earlier: When your providers complete the report and they validate it, they are locked out so they can't make any changes to it. The reason we do this is so when you see that a report is validated, you know they can't make anymore changes to it. It's not like you can review their data and then they can change it. So, if a Provider does validate their report and then needs to get back in again, you can go to the SPC Resource Center and go to the "Manage Providers" page. On the "Manage Providers" page, to the right in the last column where is says "Validated," you will be able to click on the link and you will be able to reopen the report for them.

Laura Gillis

This is Laura and I just want to reiterate something Rachael has already mentioned. It goes back to the question that Debra asked about reporting all persons served and enrolled or not enrolled. I really encourage you all to – if you were unable to attend the webcast on the National Definitions that the Administrative Workgroup did – download the great materials and documents on the PATH Webcast Resources page on the website. They outline real clearly what's the criteria for eligibility given the legislation and what are the recommendations from the administrative work group. It's the sort of thing you can literally cut and paste and you can use it with Providers – so you don't have to recreate the wheel. It should make your life easier for exampling the PATH program in your states.

Can you remind Providers that SPCs may change the date the reports are due?

Rachael Kenney

We will make it clear on tomorrow's webcast that the date we have in place is January 8^{th}, but to pay attention to emails from SPCs because the State can change that reporting date.

Laura Gillis

We need to make sure that the Providers are aware that you are setting the date. We are not because of your needs to get those reports in when it works for all of you so we will definitely do that.

Rachael Kenney

One other thing I just want to reiterate with the full reporting is that if you have any Providers that are 100% match funded, they do need to submit their date this year and please do get in touch with us by the email or the phone number on your screens (617-467-6014; path@samhsa.hhs.gov) so we can give you any assistance you need helping them complete the report and helping to get it entered on the "Manage Providers" page of the SPC Resource Center.

Laura Gillis

For some of the newer SPCs on the phone, can you talk about what a Provider would look like that's a match only?

Rachael Kenney

The best way to know which of your Providers are match only is if you refer back to the intended use plans that you submitted to SAMHSA. We don't have information about which Providers are match only and which Providers are subcontractors. It would be a match-only provider if they are not receiving any federal funds. We are collecting information on both federal and match funds this year. Even if they are a match-only provider, they will need to fill out a report. In previous years, the calculation was used because congress was interested in what the federal PATH dollar was doing and how much the federal PATH dollar contributed. In order for Providers to calculate that out, they need to figure out what the federal percentage is. Then they need to multiply every single question in the report by that percentage. It's quite a bit of additional burden for them to do that, which is why we changed it. Now they can report on all persons served and when we report to congress, we can calculate the federal percentage by a mathematical procedure rather than having each Provider calculate it by hand.

Mattie Cheek

Rachael, this is Mattie. Thanks for your presentation. I would like for you to go over again the change in reporting that has to do with full funding because we have received calls from some of the states wanting more information on how do you report if you are giving more than the state match. How does that work? Can you shed some more light on that?

Rachael Kenney

If your Provider is giving more than the required match, and it's in their PATH program, you would be reporting on all persons they serve. That's also part of why we are making this change. Some Providers do the required 1 to 3 match where for every $75 of federal funding they give $25. But that's not the case for all Providers. Some Providers, for every $75 they give $75, or $100, or $150. They are overmatching but they're not getting any credit for the people that they're serving. On the one hand that may seem like that's not fair. If a Provider is not overmatching they can not put in as many people when reporting the federal percentage. On the other hand, we still can still figure out how much funding was federal and how much funding was match and we can calculate it and compare everyone in that way.

Can you let the Providers know that if they need to change an agencies name they need to Contact their SPC. Page 5 of the guidelines says to contact the TA Center.

In order to change an agency's name, the SPC and the Provider don't have access to that information. The reason that we do that is because: Let's say I'm a SPC and I have Provider A who isn't getting funding anymore but Provider B is getting funding. We don't want me to change Provider A's name to Provider B and start collecting provider B in the same place. We have you come through the Technical Assistance Center. What I would have your Providers do, if they're name is changing. They can either contact you and have you contact us or they can contact us directly. We would be informing you of it and copying you in the reply. If they contact us directly, it takes out that extra step of them having to contact you and you having to contact us. I would encourage them to copy you and contact us directly so you don't have to do that extra step. Unless that's not what you want to do in your state. Then I would instruct them however you would like it done in your state. The ultimate end is that the TA center has to be the one to change the name.

Melissa Martin

As we're wrapping up here, I wanted to remind everyone about accessing this PowerPoint that was presented by Rachael today. It is also in that file-sharing box. We will also be putting a transcript and recording up on the website. I think Rachael can speak more to the timeline on that but it the PowerPoint is available to you right now in front of you in that box right there.

Rachael Kenney

After tomorrow's webcast, we're going to begin immediately with the transcript. We generally have these up within 2 weeks. I'm hoping to have this one up sooner since we are getting into the reporting period and this is really pertinent information for you and your Providers.

Melissa Martin

I think we've wrapped up all of the questions.

Laura Gillis

Okay great. Thank you, Melissa. Thank you, Rachael. If there are no more questions we're going to wrap up our webcast. I want to thank all of you for taking the time to attend this webcast. If you have any additional questions or suggestions please contact us at path@samhsa.hhs.gov.

We have another webcast on PATH Reporting for PATH providers tomorrow, as Rachael mentioned. Then we have another one schedule for January 5th at 12pm eastern time. Registration information will be sent out on the PATH listserv. If you're not a member of the PATH listserv and would like to receive information about future PATH webcasts, please contact us at path@samhsa.hhs.gov. Mattie would you like to close us off?

Closing Remarks by Mattie Curry Cheek, PhD

I would like to close this by thanking Laura and Rachael and her staff for this presentation and all of you – SPCs and Providers who were on as well – for attending this and for your questions. They were well thought out and we hope we provided the responses that you needed. If you do have additional questions, please contact our PATH TA Center and they will help you through this process. Thanks again and have a great Thanksgiving everybody.