PATH Annual Reporting Checklist for Providers

SAMHSA requires all PATH providers to collect data and submit the PATH Annual Report. Use the checklist below to prepare and submit your PATH Annual Report. This checklist covers reviewing HMIS data, completing and submitting the report in PDX, and ensuring accurate data.

PATH data is used to:

- Describe the strengths and successes of the PATH program
- Improve services for PATH clients
- Inform program planning, accountability, and monitoring
- Justify the need for continued or enhanced funding

Review HMIS Data and Prepare to Submit Report

- ☐ Know your state/territory's deadline for submitting the annual report.
  - The PATH Annual Report opens in mid-September and is due to SAMHSA in mid-December. Your State PATH Contact (SPC) will establish a state-specific deadline for submitting your annual report for their review.
- ☐ Know the reporting dates for your annual report. Most states/territories report data collected from July 1 – June 30, but some have different reporting dates. Check with your SPC if you are not sure.
- ☐ Gather your provider agency's PATH funding data for Section 1 (Budget) of the annual report. This data is not collected in HMIS. Check with your SPC if you are unsure of your provider agency's PATH allocations.
- ☐ Review your HMIS data to ensure all client data has been entered for the reporting period.
- ☐ Discharge clients in HMIS if they are no longer active PATH clients.
- ☐ Run the PATH Annual Report in your HMIS and download the file.
  - Contact your HMIS Administrator if you are unsure how to do this.
  - Your HMIS should produce a zip folder with six CSV files.
- ☐ Review the data and compare it to the previous annual report's data.
  - Be prepared to explain any major changes in the data and any data that is below PATH program targets or atypical for PATH programs.
- ☐ Ensure that you can log into PDX. You can request a password reset from the homepage if needed.
  - If you don't have a PDX account, a colleague who has one can create one for you, or you can contact the PDX Help Desk at pathpdx@prainc.com to request an account.

Complete the PATH Annual Report in PDX

- ☐ Log into PDX and navigate to the PATH Annual Report from your Dashboard or the Reports tab. Select “Edit Report” to begin your report.
- ☐ Complete the Report Configuration section.
    - Step 1, decide whether you will upload a CSV file or manually enter data. If you are uploading a CSV file, follow the instructions to upload the zip folder you downloaded from your HMIS.
    - Step 2, select your HMIS Vendor.
    - Step 3, review the default reporting dates for your state/territory. If the default dates align with the dates for your report, confirm that the dates are accurate. If your agency’s reporting dates differ from the default dates, enter the correct dates for your report.
- ☐ To upload a CSV file:
    - You must manually enter data for Section 1 (Budget). This data is not included in the CSV file from your HMIS.
    - Complete the report by selecting the “Edit” button to open each section, review the data, and confirm its accuracy. Don’t forget to open each report section and subsection.
- ☐ To manually enter data:
    - Select the “Edit” button next to each report section to open the section and enter data.
    - For sections that have subsections, select the plus sign to expand each subsection and enter data.
    - Select “Save” at the bottom of the section as you enter data. The system will not automatically save data that has been entered.
- ☐ Review any error messages (marked in red) and revise the data to clear the error message. Data must be corrected, and error messages must be resolved before the report can be submitted.
- ☐ Review any warnings (marked in yellow). If the data is not accurate, enter the correct data. If the data is accurate, enter a comment to explain why the data is below target or atypical. Warnings will remain flagged even after a comment is entered. You can submit the report with active warnings.
- ☐ Select the “Verify Section” checkbox when each section is complete, and then select “Save.”
- ☐ From the main Report Sections page, review your Report Metrics to ensure that the report is 100 percent complete and has no errors.
    - If your report is less than 100 percent complete, review each section to identify missing data. Each data element must have a numerical response and cannot be left blank. If a response is zero, enter a “0.”

Submit the PATH Annual Report

- ☐ Submit the report for your SPC's review by selecting the "Submit Report to SPC" checkbox and then selecting the "Submit Report" button.
    - Missing the "Submit Report" button? It will only appear when the report reaches 100 percent complete with no errors, and all sections have been verified.
- ☐ For any changes needed after submitting the report, contact your SPC to inform them that you will be making changes to your report.

Resources and Assistance

- Reach out to the PDX Help Desk at pathpdx@prainc.com for PDX assistance.
- Contact your SPC for questions about allocation amounts for Section 1 (Budget) and state/territory-specific deadlines and issues.
- The PDX User Guide for PATH Providers provides detailed instructions for completing the PATH Annual Report and Progress Reports in PDX.
- The PATH Annual Report Manual provides detailed information about each data element in the PATH Annual Report.