PATH Annual Reporting Checklist for State PATH Contacts

SAMHSA requires all PATH providers to collect data and submit the PATH Annual Report. State PATH Contacts (SPCs) are expected to review each provider's report to ensure completeness and identify potential data entry errors. Use the checklist below to understand SPCs' role during the PATH annual reporting period and ensure your state/territory's annual reporting requirements are complete.

PATH data is used to:

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

Preparing for the Annual Reporting Period

- ☐ Ensure that you can log into PDX. If necessary, you can request a password reset from the homepage.
    - 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.
- ☐ Log into PDX and examine your provider list to ensure the correct providers are active for the fiscal year. A provider agency that received PATH funds during a fiscal year is expected to submit a PATH Annual Report for the corresponding fiscal year. Follow the instructions under *Managing Providers* in the PDX User Guide for SPCs to update your list of active providers.
- ☐ Navigate to the Settings page in PDX, select the Annual Report tab, and complete the report setup for your state/territory by setting the default reporting period and inputting your state/territory's federal PATH allocation.
    - If unsure of your state/territory's federal PATH allocation for the fiscal year, see Appendix A: PATH Allocation Table in the PATH Notice of Funding Opportunity and the most recent PATH Notice of Award to find this information or contact your SAMHSA GPO.
- ☐ Review SAMHSA's due date for when annual reports must be approved by SPCs and submitted to SAMHSA. Based on this date, set a state/territory-specific deadline for when providers' reports must be submitted for your review and approval. Be sure to leave time for your review and any necessary provider revisions. Notify providers about this deadline.
- ☐ Ensure that providers know the correct amounts to report for Budget Question 1 (federal PATH funds received this reporting year) and Budget Question 2 (matching funds from state, local, or other sources used in support of PATH received this reporting year).

Reviewing and Approving PATH Annual Reports

- ☐ Monitor providers' progress throughout the reporting period and send reminders to providers as needed.
  - You can view providers' report status and the percentage by logging into PDX and navigating to the Reports page. Make sure to select the correct Year and type of report (Annual).
- ☐ When reports are in the "Submitted" status, they are ready for your review. Select the "Edit Report" button to open a report and begin your review.
- ☐ Open each report section to view the data and any comments a provider has entered.
- ☐ Ensure that the report does not contain any data elements with missing data (questions cannot be left blank and must have at least a zero entered) or unresolved errors.
- ☐ Review any flagged warnings and ensure that the provider entered a comment that addresses the issue identified in the warning.
- ☐ Identify potential inaccuracies or additional comments needed and email providers to request revisions.
  - Providers can make changes and notify you via email when the changes are complete. They do not need to resubmit their report.
- ☐ Review the amounts reported in Budget Question 1 and Budget Question 2 to ensure they are accurate. The sum reported in Budget Question 1 across all providers in your state/territory *must not exceed* your state/territory's federal PATH allocation for the corresponding fiscal year.
- ☐ When all revisions and your review are complete, approve each provider's report by navigating to the main "Report Sections" page of the report, selecting the "Approve Report" checkbox, and then selecting "Save." This will move the report into the "SPC Approved" status.

Final Signoff

- ☐ When all providers' reports have been reviewed and approved (all reports are in "SPC Approved" status), navigate to your Dashboard in PDX and select the "Submit [Year] Annual Reports to GPO" checkbox and then select "Submit" to complete your state/territory's PATH annual reporting requirements. This will move all reports into the "Data Under Review" status.
- ☐ If a provider needs to make changes to a report after it has been submitted to SAMHSA, contact the PDX Help Desk at pathpdx@prainc.com.

Resources and Assistance

- Reach out to the PDX Help Desk at pathpdx@prainc.com for PDX assistance.
- The [PDX User Guide for State PATH Contacts]() 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.