



PATH QCMR LOS and CMR

AWARDS INFORMATION SHEET

The AWARDS PATH Quarterly Contract Monitoring Report (QCMR) feature, located in the Fiscal/Program module, enables PATH Services programs in New Jersey to generate their quarterly QCMR reports. These reports were specifically designed for "PATH Services" programs that have an associated "PATH Outreach" program.

REQUIRED PERMISSIONS

Permissions required to access and use the PATH QCMR reports are:

- [Chart Access](#) – You must have chart access for the program(s) the PATH QCMR is to be viewed for.
- [Data Entry / Access](#) – Unless you are a member of the "Fiscal Staff" or "Executive Officer" user groups, you must have the "Display Executive Administration Buttons" and "Display Fiscal Buttons" permissions in order to access the Fiscal/Program module in which the PATH QCMR resides.

If you will be setting up a PATH Services program, additional permissions are required. Please see "Setting Up a PATH Program" on page 1 for details.

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of using the PATH QCMR functionality in AWARDS to generate reports and understand their content. Specific topics covered are:

- [Setting Up a PATH Program](#) – Learn how to set up PATH programs in AWARDS. Page **1**
 - [Running the PATH QCMR Level of Service Report](#) – Learn how to run the report within AWARDS. Page **4**
 - [Running the PATH QCMR Client Movement Report](#) – Learn how to run the report within AWARDS Page **4**
 - [Generating the PATH QCMR DataFile](#) – Learn how to use this data export feature Page **5**
 - [Understanding Level of Service Report Data](#) – Learn how the LOS Report is populated. Page **6**
 - [Understanding Client Movement Report Data](#) – Learn how the Client Movement Report is populated. Page **9**
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SETTING UP A PATH PROGRAM

In order for a program to have the PATH QCMR reports available for it, it must have been set up as a PATH Services program under System Setup. This program configuration takes place in two steps, each of which is detailed in the sections that follow:

- [Creating a PATH Services Program](#) – Page **2**
- [Entering PATH Contract Data](#) – Page **3**

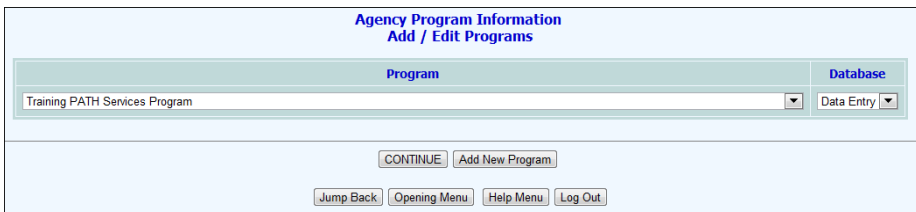
Permissions required to set up and maintain program information for PATH Services programs are as follows:

- **DATA ENTRY / ACCESS** – You must have the “Display Executive Administration Buttons” permission.
- **EXCEPTION OVERRIDES** – You must have the “Agency Program Information” permission.

In addition, you must either a) be a member of the “Human Resources” or “Executive Officer” user group, or b) have the “Permissions Data Entry” permission.

CREATING A PATH SERVICES PROGRAM

To set up a new PATH Services program, complete the following steps:

1. From the AWARDS Opening Menu page, click **System Setup**. The System Setup Menu page is displayed.
2. Click **Agency Program Information**. The Agency Programs Update Menu page is displayed.
3. Click **Add/Edit Entire Program**. The Add/Edit Programs page is displayed. 
4. Click **Add New Program**. The Agency Program Information page is displayed. By default, the first of the program information tabs, “General Settings,” is open on this page.
5. Configure the fields and options on each of the program information tabs as necessary, being sure to set the following PATH-relevant options:
 - **General Settings Tab, Program Group Option** – In order for the PATH QCMR to be available for a program, that program must have “PATH Services” selected as its program group.
 - **General Settings Tab, Division Option** – The PATH QCMR logic looks at the division information when determining whether the appropriate PATH Services and PATH Outreach program pair has been set up. As a result, be sure to select the same division when setting up both programs.
 - **Optional Settings Tab, Intake Form** – Click this drop-down arrow and select “Single Step.”

For information on all other program setup fields and options, please see AWARDS Online Help or the “Program Setup” instruction sheet.

6. Click **CONTINUE**. A confirmation dialog box is displayed.
7. Click **CONTINUE** to confirm that the changes made should be saved. A read-only report version of all agency program information is displayed.

The process of setting up a PATH Services program is now complete.

IMPORTANT! The PATH QCMR functionality was designed for PATH Services programs that have an associated PATH Outreach program within the same division. To create a PATH Outreach program, repeat the steps above, selecting “PATH Outreach” as the program group in step 5.

ENTERING PATH CONTRACT DATA

Part of the setup process for PATH Services programs is to enter their contract data. To do so, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **System Setup**. The *System Setup Menu* page is displayed.
2. Click **Agency Program Information**. The *Agency Programs Update Menu* page is displayed.
3. Click **PATH Information**. The *PATH Contract Data* settings page is displayed. →

4. Click the **Program** drop-down arrow and select the program for which the contract data is to be entered.

The Program selection list includes only those programs set up in the "PATH Services" group. For more information on that component of setup, see page 2.

5. Confirm that the **Database** option is set to its default value – "Data Entry."
6. Click the **Select Program Year** drop-down arrow and select the year for which the contract data is being entered. The default value is the current year.

In this context a program year begins in July of the year selected here, and goes through June of the following year.

7. Click **CONTINUE**. The *PATH Contract Data* data entry page is displayed. →

8. In the "PATH Service Information" portion of the page, enter contract data for the selected year by configuring the following fields/options as needed:

- **Federal PATH Funds**
- **Matching Funds**
- **Number of staff supported by PATH funds**
- **Number of FT employees supported by PATH funds**
- **Type of Organization**
- **First Contract Reporting Quarter**
- **USTF Code**


The “USTF Code” is specific to New Jersey, and displays on the QCMR reports.

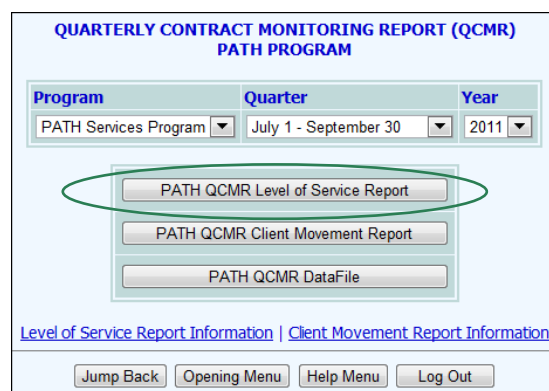
9. In the “PATH Funding Level for Service” portion of the page, click the check box next to each service provided, and then select the appropriate funding information using the corresponding radio buttons for those services.
10. Click **UPDATE**. The contract data is saved and a read-only confirmation page is displayed.

The process of entering PATH contract data is now complete.

RUNNING THE PATH QCMR LEVEL OF SERVICE REPORT

To run the PATH QCMR Level of Service Report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.
2. Click **PATH QCMRs and Data Export**. The *Quarterly Contract Monitoring Report (QCMR) PATH Program settings* page is displayed. 
3. Click the **Program** drop-down arrow and select the program for which the report is to be run. To run the report for all relevant programs simultaneously, select the last option in the list: “All PATH Programs.”
4. The date range specified in the **Quarter** option defaults to July 1 – September 30, and the **Year** option defaults to the current year. These date settings can be left with their default values or changed as needed.
5. Click **PATH QCMR Level of Service Report**. The report is displayed on the *Quarterly Contract Monitoring Report (QCMR) Level of Service Report* page. This report has agency and date identifying information, and then proceeds to a list of 12 numbered report elements.



The report data also populates a Microsoft Excel file, a link to which is displayed at the top of the page.

For more information on each section of the report and the data it contains in both the AWARDS and Excel versions, see “Understanding Level of Service Report Data” on page 6.

The process of running the PATH QCMR Level of Service Report is now complete.

RUNNING THE PATH QCMR CLIENT MOVEMENT REPORT

To run the PATH QCMR Client Movement Report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.

- Click **PATH QCMRs and Data Export**. The *Quarterly Contract Monitoring Report (QCMR) PATH Program* settings page is displayed. →
- Click the **Program** drop-down arrow and select the program for which the report is to be run. To run the report for all relevant programs simultaneously, select the last option in the list: "All PATH Programs."
- The date range specified in the **Quarter** field defaults to July 1 – September 30, and the **Year** field defaults to the current year. This date range can be left with its default values or changed as needed.

- Click **PATH QCMR Client Movement Report**. The report is displayed on the *Quarterly Contract Monitoring Report (QCMR) Client Movement Report* page. This report has agency and date identifying information, and then proceeds to a list of 7 numbered report elements.

The report data also populates a Microsoft Excel file, a link to which is displayed at the top of the page.

For more information on each section of the report and the data it contains in both the AWARDS and Excel versions, see "Understanding Client Movement Report Data" on page 9.

The process of running the PATH QCMR Client Movement Report is now complete.

GENERATING THE PATH QCMR DATAFILE

To generate the PATH QCMR DataFile, complete the following steps:

- From the *AWARDS Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.
- Click **PATH QCMRs and Data Export**. The *Quarterly Contract Monitoring Report (QCMR) PATH Program* settings page is displayed. →
- Click the **Program** drop-down arrow and select the program for which the DataFile is to be generated. To generate the file for all relevant programs simultaneously, select the last option in the list: "All PATH Programs."
- Click **PATH QCMR DataFile**. The *Quarterly Contract Monitoring Report (QCMR) DataFile* page is displayed. →
- Click the link **Click to Download – PATH QCMR DataFile**. The file is downloaded to your computer as an Excel file.

The process of generating the PATH QCMR DataFile is now complete.

UNDERSTANDING LEVEL OF SERVICE REPORT DATA

The Quarterly Contract Monitoring Report (QCMR) Level of Service (LOS) Report has a header section followed by 12 numbered questions.

All data in the header portion of the report is information selected on the *Quarterly Contract Monitoring Report (QCMR) PATH Program* settings page (see page 4) with the exception of the UTF Project Code. The UTF is entered via the System Setup module using the Agency Program Information feature's PATH Information component (as described on page 3).

All data in the body of this report derives from the selected PATH Services program(s) and the corresponding Outreach program(s).

DATA DESCRIPTION	DATA #	DATA VALUE
Of the ending caseload how many individuals are Medicaid/Familycare Enrolled:	1A	A count of clients in the program during the reporting quarter for whom "Medicaid health insurance program" was specified as a non-cash benefit at Intake, or for whom there was a Medicaid entitlement in effect during the reporting quarter.
Of the ending caseload how many individuals are Medicaid/Familycare Non-Enrolled:	1B	A count of clients in the program during the reporting quarter who, on the last day of the quarter, no longer have a current Medicaid entitlement, and no longer identify a non-cash benefit of "Medicaid health insurance program" on an HMIS Update subsequent to intake. <i>#1A + #1B on the LOS report will equal the value of question #1 on the QCMR Client Movement Report.</i>
Total Number of Unduplicated Homeless Individuals Outreached in this Quarter (For current contract year)	2	A count of any outreached (non-enrolled) clients with their initial encounter date in the reporting quarter, as entered in the Intake/Admission module. The report will derive this data from the corresponding "Outreach" program within the division of the PATH Services program that the report is being run for.
Total Number of Newly Enrolled Clients who are MICA	3	A count of enrolled clients who were admitted to the program during the reporting quarter, who have MICA selected on their intake form.

DATA DESCRIPTION	DATA #	DATA VALUE
Number of face-to-face On-Site Contacts with enrolled clients	4	<p>The number of on-site face-to-face contacts that took place with clients enrolled in the program during the reporting quarter.</p> <p>On-site contacts are those where the location was set to "This Program Site," as well as those where no location selection was made.</p> <p>This question includes each contact of 15 continuous minutes. Each additional 15 minute period constitutes another contact.</p> <p>The "individual" column reflects the number of individual contacts as defined above.</p> <p>The "group" column reflects the number of on-site group contacts for program clients during the reporting quarter. This number includes any contact for which there is a group note (where the client was marked as been in attendance). The number of contacts counted per group note will be the duration in 15 minute increments, multiplied by the number of participants for that group.</p>
Number of face-to-face Off-Site Contacts with enrolled clients	5	<p>The number of off-site face-to-face contacts that took place with clients enrolled in the program during the reporting quarter.</p> <p>Off-site contacts are those where the location was set to anything other than "This Program Site."</p> <p>The question includes each contact of 15 continuous minutes. Each additional 15 minute period constitutes another contact.</p> <p>The "individual" column reflects the number of individual contacts as defined above.</p> <p>The "group" column reflects the number of off-site group contacts for program clients during the reporting quarter. This number includes any contact for which there is a group note (where the client was marked as been in attendance). The number of contacts counted per group note will be the duration in 15 minute increments, multiplied by the number of participants for that group.</p>
Units of Service (Sum of 4 & 5)	6	The "individual" and "group" sums for #4 and #5.

DATA DESCRIPTION	DATA #	DATA VALUE
Aggregate Number of Telephone Minutes with or on behalf of enrolled clients:	7	An aggregate number of minutes counting the duration of any phone call contact recorded using the Supportive Services Checklist, and any progress notes with a note type of "Collateral Contact" with "Phone Call" selected as the service type, both for dates during the reporting quarter for clients in the program during that quarter.
Of the Total Number of Face-to-face contacts how many are provided to individuals who are Medicaid/Familycare Enrolled	8A	The number of contacts counted in the "individual" column for question #6 that involved clients counted in question #1A.
Of the Total Number of Face-to-face contacts how many are provided to individuals who are Medicaid/Familycare Non-Enrolled	8B	The number of contacts counted in the "individual" column for question #6 that involved clients counted in question #1B. <i>The values for #8A + #8B will equal the value found in question #6's "individual" column.</i>
Of the Total Number of Group Face-to-face contacts how many are provided to individuals who are Medicaid/Familycare Enrolled	9A	The number of contacts counted in the "group" column for question #6 that involved clients counted in question #1A.
Of the Total Number of Group Face-to-face contacts how many are provided to individuals who are Medicaid/Familycare Non-Enrolled	9B	The number of contacts counted in the "group" column for question #6 that involved clients counted in question #1B. <i>The values for #9A + #9B will equal the value found in question #6's "group" column.</i>
Total Number of Enrolled Clients Linked to Programs/Services in the following Areas: Financial:	10A	The total number of enrolled, unduplicated clients during the reporting quarter for whom there is a service referral with a purpose/need selection of "PATH Referral for Income Assistance" or "Benefits/Entitlements."
Long-term Housing:	10B	The number of enrolled, unduplicated clients during the reporting quarter for whom there is a service referral with a purpose/need selection of "PATH Referral for Housing Placement Assistance."
Temporary Housing:	10C	The number of enrolled, unduplicated clients during the reporting quarter for whom there is a service referral with a purpose/need selection of "PATH Referral for Relevant Housing Services."
Drug/Alcohol Program:	10D	The number of enrolled, unduplicated clients during the reporting quarter for whom there is a service referral with a purpose/need selection of "PATH Referral for Substance Use Treatment."
Medical/Dental:	10E	The number of enrolled, unduplicated clients during the reporting quarter for whom there

DATA DESCRIPTION	DATA #	DATA VALUE
		is a service referral with a purpose/need selection of "PATH Referral for Primary Health Services."
Mental Health:	10F	The number of enrolled, unduplicated clients during the reporting quarter for whom there is a service referral with a purpose/need selection of "PATH Referral for Community Mental Health."
Habilitation/Rehabilitation Services:	10G	The number of enrolled, unduplicated clients during the reporting quarter for whom there is a service referral with a purpose/need selection of "PATH Referral for Employment Assistance," "Employment Training," or "Habilitation/Rehabilitation Services."
Referred to Screening or for Psych. Eval:	10H	The number of enrolled, unduplicated clients during the reporting quarter for whom there is a service referral with a purpose/need selection of "Screening/Psych Evaluation."
Number of Enrolled Clients for whom funds were expended for housing services this quarter	11	The number of enrolled clients in the program during the reporting quarter. Any client in this program is considered as a client for whom funds were expended for housing services.
Number of Enrolled Clients receiving Supportive/Supervisory Services this Quarter in a residential setting	12	The total number of enrolled clients with contacts/progress notes/services (service plan data) during the reporting quarter where the service type is "PATH Residential supportive services."

UNDERSTANDING CLIENT MOVEMENT REPORT DATA

The Quarterly Contract Monitoring Report (QCMR) Client Movement Report has a header section, followed by data for seven numbered questions.

All data in the header portion of the report is information selected on the *Quarterly Contract Monitoring Report (QCMR) PATH Program* settings page (see page 4), with the exception of the USTF Project Code. That code is entered via the System Setup module using the Agency Program Information feature's PATH Information component (as described on page 3).

All data in the body of this report derives from the selected PATH Services program(s).

DATA DESCRIPTION	DATA #	DATA VALUE
Beginning Active Caseload (First Day of Quarter)	1	The number of clients in the program as of the first day of the selected quarter.
New Enrollees to Program Element During Quarter	2	The number of clients admitted to the program during the selected quarter, as

DATA DESCRIPTION	DATA #	DATA VALUE
		indicated at Intake by a client enrollment status of "New Enrollee."
Transfers to Program Element During Quarter	3	The number of clients transferred to the program during the selected the quarter, as indicated at Intake by a client enrollment status of "Transfer."
Transfers from Program Element During Quarter	4	The number of clients transferred from the program to another program in the agency in the selected quarter, as indicated at Intake by a "Yes" response to the question "Client transferred to another program within your agency."
Terminations from Program Element During Quarter	5	The number of clients discharged from the program in the selected quarter.
Ending Active Caseload (Last Day of Quarter)	6	The number of clients in the program as of the last day of the selected quarter.
Clients who were Discharged from State Hospitals and Enrolled in this Program Within 30 Days of Discharge	7A*	The total new enrollees and transfers to the program with a referral source program type selection of "State Hospital," as entered at intake.
Clients who were Discharged from County Hospitals and Enrolled in this Program Within 30 Days of Discharge	7B*	The total new enrollees and transfers to the program with a referral source program type selection of "County Hospital," as entered at intake.
Clients who were Discharged from a Short-Term Care Facility/Involuntary Psychiatric Unit and Enrolled in this Program Within 30 Days of Discharge	7C*	The total new enrollees and transfers to the program with a referral source program type selection of "Short Term Care Facility/Involuntary Psychiatric Unit," as entered at intake.
Clients who were Discharged from another Hospital and Enrolled in this Program Within 30 Days of Discharge	7D*	The total new enrollees and transfers to the program with a referral source program type selection of "Other Psychiatric Hospital," as entered at intake.

* Questions #7A through #7D provide separate totals for new enrollees and transfers. Clients counted in question #2 are included in the "New Enrollees" column of data, while clients counted in question #3 are included in the "Transfers" column.