



# PATH RECORDS NEW SEPT 2021

1. PATH Monitoring Clinical Records Cx PATH Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: e. 1 goal for each treatment / housing related issue
2. PATH Monitoring Clinical Records Cx PATH Client Records (65E-4.014.3.b.1)-- PATH Client Record includes: Sex.
3. PATH Monitoring Clinical Records Cx PATH Client Records (65E-4.014.3.b.1)-- PATH Client Record includes: Race.
4. PATH Monitoring Clinical Records Cx PATH Client Records (65E-4.014.3.b.1)-- PATH Client Record includes: Date of birth.
5. PATH Monitoring Clinical Records Cx PATH Progress Notes (65E-4.014.3.c)-- PATH Progress notes shall be prepared at least monthly for clients having a PATH service or treatment plan unless documented otherwise. Content shall include:
  - 3) Modified service or treatment plan from changes in client's needs, resources, findings.
6. PATH Monitoring Clinical Records Cx PATH Progress Notes (65E-4.014.3.c)-- PATH Progress notes shall be prepared at least monthly for clients having a PATH service or treatment plan unless documented otherwise. Content shall include:
  - 1) Contact dates with client, family, friends, or service agencies;
7. PATH Monitoring Clinical Records Cx PATH Progress Notes (65E-4.014.3.c)--PATH Progress notes shall be prepared at least monthly for clients having a PATH service or treatment plan unless documented otherwise. Content shall include:
  - 2) Progress, or lack thereof, relative to the service plan or treatment plan as it pertains to housing or treatment / treatment referral.
8. PATH Monitoring Clinical / PATH Records Cx Requirements--Client Identifier
9. PATH Monitoring Clinical / PATH Records Cx Requirements--Record ID
10. PATH Monitoring Clinical / PATH Records Cx Requirements--Client Initials
11. PATH Monitoring Clinical Records Cx PATH Termination (65E-4.014.3.d)--PATH Termination report must be in the record within 4 weeks after official termination of services. Termination Report shall include: 2) Date and signature of individual preparing report.
12. PATH Monitoring Clinical Records Cx PATH Termination (65E-4.014.3.d)--PATH Termination report must be in the record within 4 weeks after official termination of services. Termination Report shall include: 3) If there is a referral, a reason for the referral must be noted.
13. PATH Monitoring Clinical Records Cx PATH Termination (65E-4.014.3.d)--If no contact over 90 days, file must be closed, unless PATH service or treatment plan indicates less frequent contact. Reason for termination must be included.



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14. PATH Monitoring Clinical Records Cx PATH Termination (65E-4.014.3.d)--PATH Termination report must be in the record within 4 weeks after official termination of services. Termination Report shall include: 1) Evaluation of impact of agency's services on client's goals or objectives related to housing stabilization / treatment / referral to treatment
15. PATH Monitoring Clinical Records Cx / PATH Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: a. Achievable, observable, measurable.
16. PATH Monitoring Clinical Records Cx PATH Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: f. Primary Therapist, PATH worker or treatment coordinator shall develop goals or objectives for those resources on either the treatment plan or PATH service plan
17. PATH Monitoring Clinical Records Cx PATH Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: g. If service is unavailable within the agency, Primary therapist or PATH worker must link client to appropriate agencies.
18. PATH Monitoring Clinical Records Cx PATH Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: Housing stabilization, Treatment or referral to treatment
19. PATH Monitoring Clinical Records Cx PATH Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: d. Incorporate needs and strengths from PATH assessment
20. PATH Monitoring Clinical Records Cx PATH Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: c. Actions needed to attain the housing and treatment related goals and staff responsible.
21. PATH Monitoring Clinical Records Cx PATH Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: b. Reasonable timeframe
22. PATH Monitoring Is there documentation available to support incidental funds expended on any of the PATH-eligible housing services? (ID 24 - Florida PATH Manual - DCF Guidance 15)
23. PATH Monitoring Is the PATH service plan for each consumer being reviewed every 3 months and is their a form which outlines the review? (ID 24 - Florida PATH Manual - DCF Guidance 15)
24. PATH Monitoring Does the PATH service plan for each consumer include a location for what community mental health services are needed and the referral? (ID 24 - Florida PATH Manual - DCF Guidance 15)
25. PATH Monitoring Does the PATH service plan include coordination and referrals for needed services such as shelter, daily living activities, personal and benefits planning, transportation, habilitation and rehabilitation services, prevocational and employment services, and permanent housing and a location on the plan describing the status of each? (ID 24 - Florida PATH Manual - DCF Guidance 15)
26. PATH Monitoring PATH organizations must maintain medical records for each PATH participant containing but not limited to an intake/assessment form, a determination of eligibility for PATH-funded services, a service plan, and progress notes. (ID 24 - Florida PATH Manual - DCF Guidance 15)



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27. PATH Monitoring Does the service plan include coordination and referrals for needed shelter services? (ID 24 - Florida PATH Manual - DCF Guidance 15)
28. PATH Monitoring Does the service plan include coordination and referrals for needed transportation services? (Florida PATH Manual - DCF Guidance 15)
29. PATH Monitoring Does the service plan include coordination and referrals for needed permanent housing services? (ID 24 - Florida PATH Manual - DCF Guidance 15)
30. PATH Monitoring Does the service plan include coordination and referrals for needed prevention services if currently housed? (ID 24 - Florida PATH Manual - DCF Guidance 15)
31. PATH Monitoring Clinical Records Cx / PATH Assessment (65E-4.014.6.a (1)(2)(3))-- PATH Assessment is completed 30 days after intake and include the following with client input: a. Current and potential strengths and problems b. information from the intake and evaluation c. Description of the client's current and potential strengths and problems, the client's family and friends, pertinent service agencies with whom the client has been involved, and other social support systems that may contribute to the course of treatment / treatment referral / housing stabilization.
32. PATH Monitoring Clinical Records Cx PATH Assess Trx Plan (65E-4.014(6), F.A.C.)-- PATH Treatment Plan/Service Plan must be completed, and the PATH related actions specified in the plan must be initiated for each active client within 30 days after completion of intake.
33. PATH Monitoring Clinical Records Cx PATH Client Record (65E-4.014.3.b.2)--Client Record includes: PATH Staff name who has primary responsibility of client
34. PATH Monitoring Clinical Records Cx PATH Client Record (65E-4.014.3.b.8)-- PATH Client Record includes: Time-specific release of information, signed/dated by client/guardian, authorizing a designated the agency to receive the information
35. PATH Monitoring Clinical Records Cx PATH Client Record (65E-4.014.3.b.11)-- PATH Client Record includes: Legal status
36. PATH Monitoring Clinical Records Cx PATH client records (65E-4.014.3.b.1)--PATH Client Record includes: Marital status.
37. PATH Monitoring Clinical Records Cx PATH Client Records (65E-4.014.3.b.1)-- PATH Client Record includes: Guardian contact information for minor clients.
38. PATH Monitoring Clinical Records Cx PATH Client Records (65E-4.014.3.b.1)-- PATH Client Record includes: Client Name
39. PATH Monitoring Clinical Records Cx PATH Client Records (65E-4.014.3.b.1)-- PATH Client Record includes: Address.
40. PATH Monitoring Clinical Records Cx PATH Client Records (65E-4.014.3.b.1)-- PATH Client Record includes: Referral source.



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41. PATH Monitoring Clinical Records Cx PATH Client Records (65E-4.014.3.b.1)-- PATH Client Record includes: Telephone number.
42. PATH Monitoring 03 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) PATH Eligibility Criteria: Must individuals be homeless or at imminent risk of becoming homeless?
43. PATH Monitoring 04 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) PATH Eligibility Criteria: Must individuals be suspected of having a serious mental illness or a co-occurring disorder?
44. PATH Monitoring 05 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) PATH Intake/Assessment: Is an intake form/assessment present?
45. PATH Monitoring 12 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Is VA status addressed on the PATH Intake/Assessment?
46. PATH Monitoring 13 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Is mental health diagnosis addressed on the PATH Intake/Assessment?
47. PATH Monitoring 14 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Is co-occurring substance abuse addressed on the PATH Intake/Assessment?
48. PATH Monitoring 15 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Is housing status at first contact addressed on the PATH Intake/Assessment?
49. PATH Monitoring 17 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Are benefits addressed on the PATH Intake/Assessment?
50. PATH Monitoring 18 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Is educational history addressed on the PATH Intake/Assessment?
51. PATH Monitoring 19 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Is vocational history addressed on the PATH Intake/Assessment?
52. PATH Monitoring 20 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Is the presenting problem addressed on the PATH Intake/Assessment?
53. PATH Monitoring 21 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Is psychiatric history/treatment addressed on the PATH Intake/Assessment?
54. PATH Monitoring 22 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Is substance abuse history/treatment addressed on the PATH Intake/Assessment?
55. PATH Monitoring 23 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Are physical health concerns addressed on the PATH Intake/Assessment?
56. PATH Monitoring 24 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Are strengths/skills/functional levels addressed on the PATH Intake/Assessment?



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57. PATH Monitoring 33 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Do Service Plan goals describe assistance with benefits (i.e. SSI/VA/TANF/Food Stamps)?

58. PATH Monitoring 34 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Do Service Plan goals describe assistance with transportation?

59. PATH Monitoring 36 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Do Service Plan goals describe assistance with permanent housing?

60. PATH Monitoring 38 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Do Service Plan goals describe assistance with employment?

61. PATH Monitoring 39 (Authority: Contract 42 U.S.C. 290cc-21 et. seq. and 42 C.F.R., Part 54) Do Service Plan goals describe assistance with primary healthcare?