Pathways COMMUNITY NETWORK INSTITUTE	**User Access Checklist** *(Please Print)*
Agency Name:	
Location:	
User's Name:	
User's Work Phone:	
User's Work Email:	

In addition to this form, New User Training and Confidentiality & Best Practices Training is required for all users accessing the Pathways Compass system.

Date of New User Training: _______________

Date of Confidentiality and Best Practices Training: _______________

INSTRUCTIONS:

1. Check "Yes" for each desired *PATHWAYS COMPASS* command below.
2. Have your supervisor sign this form in the space provided below.
3. Turn in this form to your agency's *PATHWAYS COMPASS* Administrator for processing.
4. For questions, please contact Pathways Support at 404-639-9933 option 2, 866-818-1032 option 2, or email us at support@pcni.org.

CLIENT and CLIENT VISIT MENU COMMANDS	**Select All** ☐
This user needs access to the selected commands, in order to… (For more information, please see the *PATHWAYS COMPASS User Guide*.)	**Select**
General – Edit client general information	☐
Household – Work with client family (household members) information	☐
Residence – Work with residence history and contact information for the client's household	☐
Emergency – Work with information about who might know how to contact the client, or who could be contacted in case of a client emergency	☐
Finance – Work with client income and expense information	☐
Education – Edit client education information	☐
Veteran – Edit client veteran information	☐
Special Needs – Work with client special needs information	☐
Benefits – Determine a client's possible eligibility for benefit programs	☐
Services – Work with client visit information including services provided, disbursements, referrals, and reservation requests	☐
Programs – Work with client program entry and exit information	☐
Assessment – Work with predefined sets of questions and answers for a client	☐
Custom – Work with client visit information containing agency-specific customized fields	☐
Messages – Work with messages for other case managers or other agencies regarding a client	☐
Case Notes – Work with client case notes	☐
Progress – Work with client goal history and client status indicator history information	☐
EFSP – View ALL recorded EFSP transactions	☐
SSFV – View ALL recorded SSVF transactions	☐

REPORTS MENU COMMANDS	
This user needs access to the selected commands, in order to… (For more information, please see the *PATHWAYS COMPASS Reports User Guide*.)	**Select**
Lists – Access and print regional agency lists and blank authorization forms	☐
Statistical – Run reports containing statistical demographic totals for clients and households based on occupancy in a program or individual visit records	☐
Funds – Run reports containing summary information based on visit records that represent disbursements	☐
Summary – Run reports containing individual client names, keys and other identifying information based on occupancy in a program or individual visit records	☐
Data Export – Create .CSV format files that can be imported into a spreadsheet or database application	☐
Agency – Run reports which have been created specifically for your agency (Most agencies do not have these.)	☐

MY AGENCY MENU COMMANDS **(Except for REFERRALS, these commands are for AGENCY ADMINISTRATORS only.)**			**Select All** ☐
This user needs access to the selected commands, in order to… (For more information, please see the *PATHWAYS COMPASS User [Referrals command] and Administration [all other commands] Guides*.)			
Command	**Select**	**Command**	**Select**
Profile – Configure the Intake process, Transgender and Last Referral Source fields, Homelessness Survey.	☐	**Funds –** Configure fund resource names and amounts used on the Services page for disbursements	☐
Fields – Configure agency-specific list fields for the Custom page	☐	**Programs –** Configure programs in which an agency will enroll clients	☐
Keywords – Configure the Keyword list field used to categorize clients on the General page	☐	**Info** – Edit the agency's contact, description, referral, shelter, and authorization information	☐
Reasons – Configure the Reason Denied list field on the Services page	☐	**Admissions –** Configure admission conditions, used in bed programs for shelters	☐
Services – Configure the Preferred Needs List, used on the Services page	☐	**Reservations –** Work with inbound bed reservation requests (shelters)	☐
Beds – Configure bed information, used in bed programs for shelters	☐	**Users** – Create and edit user profiles, including IDs and passwords. Process User Access Checklists.	☐
Referrals – Update the Status field on the Services page for inbound referrals.	☐	**Assessments –** Create and edit agency level client assessment questions.	☐
Sites – Create and edit agency sites, used to create programs and preferred services	☐		

SUPERVISOR'S AUTHORIZATION SIGNATURE
Please have your **supervisor** authorize your selections by signing below. Then turn this form in to your agency's **administrator** for processing. (If your agency has no administrator, or you need the **Profile** command, you may fax this form to Pathways Support, 404-982-0960 or 866-818-3036.)
Supervisor Signature:______________________________ Printed Name:____________________ Date:______________