

Pathway Centralization

What's changing for your pathways

Equip Webinar · August 14, 2026 · Trent Kocurek

Five things arrive

1. **Linking** — goals, notes, forms, assessments, and documents attach to a pathway or a step
2. **The pathway progress page** — everything about one participant's service, on one screen
3. **Discharge** — record that a service ended early, with a reason
4. **Closure** — mark an enrollment finished, and reopen it if needed
5. **Reporting** — pathway and step columns, discharge reasons, closed-enrollment filters, and a consolidated export

One and two are the headline. Three and four your documentation staff will feel immediately.

WHAT IS NOT CHANGING

Nothing you built goes away

- ✓ Your pathways, steps, codes, and rates are untouched
- ✓ Existing enrollments, dates, and supporters carry forward
- ✓ Authorizations, invoicing, and billing prep work exactly as they do today
- ✓ No re-entry, no migration, no rebuild

This is additive. Your pathways are exactly as you left them, with new capabilities on top.

LINKING

Five record types can now attach to a pathway

Goals

The objective the service supports.

Notes

Service delivery notes, contact logs.

Forms

Intake, evaluations, employer feedback.

Assessments

Baseline and progress.

Documents

Authorizations, evaluations, verification letters.

Not yet linkable Events and routines are planned for a later release. Any existing connections keep working.

The picker is the same everywhere — “Link to Pathways or Steps” — on the form your team already fills out.

LINKING

Attach to the pathway, or to the exact step

Every link is made at one of two levels. Choose deliberately.

Pathway-level — spans the whole service

Participant service agreement

Overall employment goal

Step-level — belongs to one phase

Situational assessment results → Discovery

Employer feedback form → Job Development

Job coaching notes → Supported Employment

Step-level is where the reporting payoff is — one filter answers a whole phase.

When in doubt, link to the step. You can always read up; you can't read down.

THE PATHWAY PROGRESS PAGE

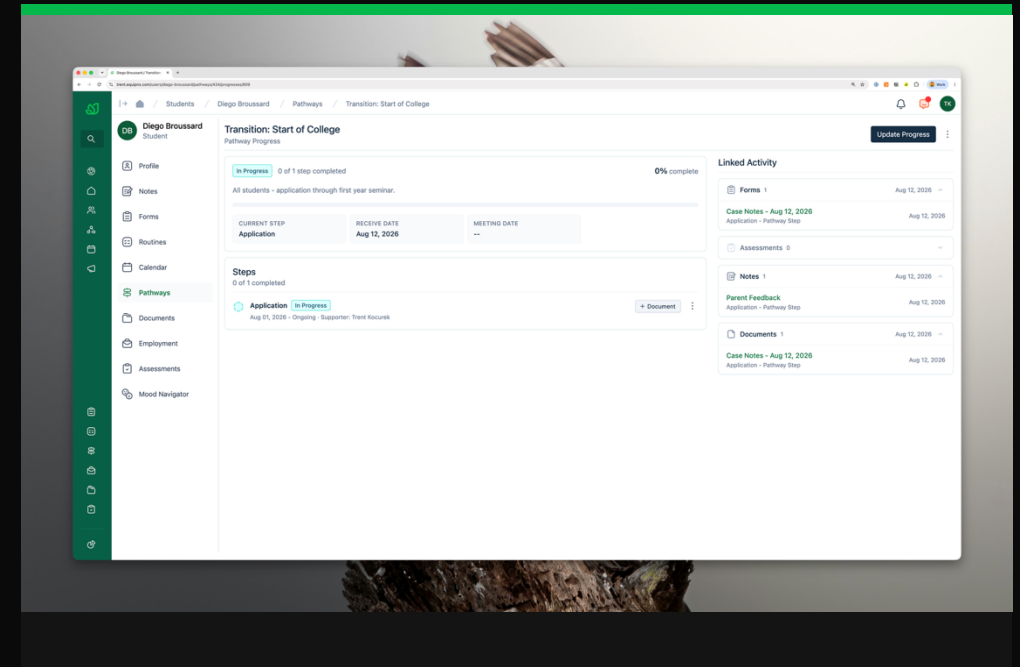
One participant, one service, one screen

Step timeline — dates, supporter, status, and discharge, per step

Linked Activity — collapsible sections per record type, with counts and most recent dates

Open in place — notes, forms, assessments, and documents open right there

Permission-aware — team members see only the modules their role grants



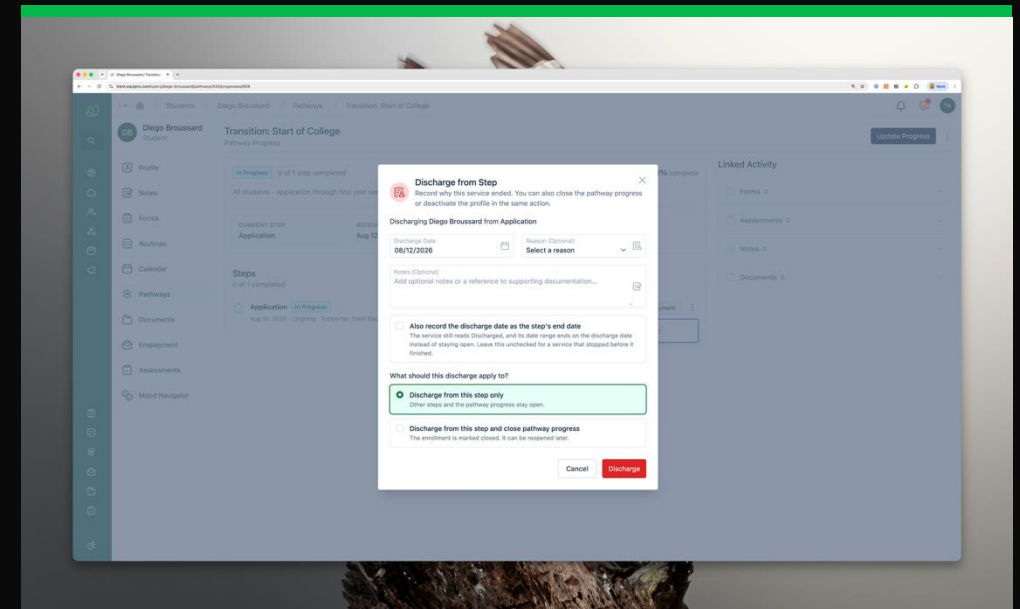
Linking doesn't widen access. If a role can't see documents, that section isn't there for them.

DISCHARGE

Discharge — recording how a service ended

Discharge closes out the step and captures why, whenever you record it.

- Recorded on the step, because the step is the service
- Captures date, reason, notes, and optionally an end date
- Use it whether the service stopped early or finished — including when you discharge later, once documentation is complete
- A discharged step isn't completed on its own; a step with an end date still counts as completed
- Bulk discharge from the progresses list; undo is a permissioned action



It ends the guesswork: no more services sitting in progress forever, and no completions that never happened.

CLOSURE

Closure — the whole enrollment is done

Enrollment-level. This participant's time on this pathway is finished.

Discharge = one service ended

Recorded on a step. Someone can be discharged from job development and still active in supported employment.

Closure = the enrollment is finished

Does not change the participant's profile status
Blocked while a service is still running — finish or discharge first
Closed enrollments can be reopened

Closing an enrollment doesn't deactivate the participant — they're still on your caseload.

Discharge is a step. Closure is an enrollment. Don't let the team use them interchangeably.

New filters

- Filter notes, forms, assessments, and documents by pathway or step
- Filter for records linked vs not yet linked
- Discharged tile on the progresses list, alongside Not Started / In Progress / Completed
- Filter by discharge reason
- Closed pathways only toggle, plus a Pathway Closed badge on the list

“Not yet linked” is your cleanup tool. Run it weekly for the first month and the back catalog connects itself.

What the reports gain

Pathway data is available as columns and filters in your existing reports.

Column or filter	What it answers
Pathway and step columns	Which service and phase produced this form or assessment?
Discharge columns and reason filters	Why did participants leave, and at which step?
Closed-enrollment columns and filters	Which enrollments are finished?
Completed / In Progress / Started / Discharged	Four distinct populations, not one bucket

Past reporting windows stay stable — a discharge recorded later doesn't shrink last quarter's numbers.

Consolidated export

- One PDF of a participant's full pathway record
- Choose the sections and the date range
- Saves into the participant's document library
- Requires Documents access on your role

Use it for CARF and CQL review · VR counselor documentation · case file requests · annual summaries

Instead of assembling a file, pick sections and a date range — and it files itself back into their documents.

DELETION IS GUARDED

You can't delete a service history by accident

The guards cover structure as well as data.

What you'll see

Deleting a pathway now shows exactly what's attached first

The same preview appears at the step level

What's protected

Pathways with enrollments, authorizations, or linked records can't be deleted

Retire a pathway by no longer enrolling on it — history stays intact

If a contract ends, the record of what you delivered should outlive the funding that paid for it.

What to do first

Week 1 — Decide and configure

- Review your discharge reason list (Settings → Customizations)
- Agree on one linking rule: every service note gets a step
- Brief supporters — it's one extra field at save

Week 2 — Link and check

- Run the “not yet linked” filter on notes and forms
- Discharge the enrollments that have been sitting open
- Run the pathway progress report and compare it to last month

Most programs have a batch of enrollments that never really ended. Clearing those is a half-day of work.

It fixes your completion rate permanently.

QUESTIONS

Questions

Two things before we open it up:

- Recording and slides go to all registrants
- Want a working session on your account? [CONTACT / BOOKING LINK]

Appendix slides cover authorizations, availability, and discharge versus end date.