

Pathways & Pathway Centralization

Tracking the full arc of student support in Inclusive Higher Education

What you'll leave with

- A clear mental model of pathways, steps, and enrollments
- A walkthrough of every pathway, step, and account-level setting
- Higher-ed-specific examples you can copy
- What Pathway Centralization unlocks — and what to turn on first
- A rollout plan for your program

This is a build-it-with-me session, not a feature tour.

Agenda

1. Why pathways exist — the problem they solve
2. The model: pathways, steps, enrollments
3. Building a pathway — every setting explained
4. Running a pathway — enrollment, progress, discharge, closure
5. Pathway Centralization — one place for everything
6. Reporting, rollout, and Q&A

Parts three and four are the longest — that's the settings walkthrough.

PART 1

Why pathways exist

The problem pathways solve

The service is real. The record of it isn't.

- A participant moves through intake, assessment, placement, follow-up — and each stage lives in a different place
- Notes sit in one module, forms in another, assessments in a third, documents in a fourth
- Nobody can answer "where is this participant right now?" without opening five screens
- When a team member leaves, the sequence they carried in their head leaves with them

A pathway makes the sequence explicit, repeatable, and reportable.

What a pathway is

A named sequence of steps a participant moves through, configured once and reused for every participant who follows it.

Configured once

The pathway and its steps are set up by an admin and reused across the whole program.

Tracked per participant

Each enrollment records where that individual is and when they got there.

Reportable

Progress, duration, and outcomes roll up across every participant on the pathway.

What this replaces

What you're doing today	What a pathway gives you
A shared spreadsheet of who's at what stage	A live status on every enrollment
Asking a colleague where someone is	A Linked Activity page per participant
Re-explaining the process to every new hire	Configuration that documents itself
Counting completions by hand at quarter end	Report columns and a consolidated export
Notes and forms scattered across modules	Every artifact linked to the step it belongs to

PART 2

The model

Pathways, steps, enrollments — and which of those you configure versus track.

Anatomy of a pathway

CONFIGURED ONCE

Pathway

Name, description, categories, custom fields, date fields, discharge reasons

Steps

Ordered list — each with name, code, description, custom fields, billable settings

TRACKED PER PARTICIPANT

Enrollment

One participant on one pathway — dates, assigned team member, closure record

Step Progress

Which step, when they entered it, when it completed, discharge if it didn't

Left side is admin work you do once. Right side is what the system records every day.

Single-step and multi-step pathways

Single-step

One step. The pathway is the service.

Use it when there is nothing meaningful to sequence — a standing support, a recurring service, an eligibility hold.

Enrollment is effectively open or closed.

Multi-step

An ordered sequence a participant advances through.

Use it when the stages are distinct, happen in order, and each one has its own artifacts.

Progress is derived from where they are in the sequence.

Start single-step if you're unsure. Adding steps later is easy; unwinding a bad sequence is not.

Mapping to a higher ed program

Program area	Pathway	Shape
Admissions & onboarding	Admissions & Onboarding	Multi-step: Inquiry → Application → Decision → Orientation
Career services	Career Development	Multi-step: Exploration → Shadow → Internship → Employment
Independent living	Independent Living Skills	Multi-step: Daily Living → Money Management → Transportation
Mentoring	Peer Mentor Support	Single-step
Academics	Academic Coaching	Single-step
Residential	Residential Support	Single-step

How to think about a pathway

Three mental models, all of them fair. Use whichever one your team already speaks.

As a to-do list

A participant working through an application really is working down a list.

Keep each step at stage level and let the linked notes and forms carry the detail.

As a workflow

The sequence is real, ordered, and shared by the whole team.

It documents itself — a new team member inherits the process instead of learning it.

As the spine of a care plan

The pathway holds the shared structure.

An individual's goals hang off their enrollment. Shared shape, personal detail.

On the roadmap

Today the sequence is carried by the structure and the team. Triggers, auto-assignment, and step notifications are what we're building next.

PART 3

Building a pathway

Every setting, what it controls, and the constraints that bite later.

Settings live in three places

Pathway level

Name and description

Categories

Custom fields

Applies to every enrollment on this pathway

Step level

Name, code, description

Custom fields

Billable, price, price by

Applies to every participant who reaches that step

Account level

Pathway date fields

Days Between and Total Days goals

Discharge reasons

Applies to every pathway in the account

Account-level settings are shared. Changing one affects every pathway you have.

Pathway-level settings

Four fields define the pathway itself. We'll take them one at a time.

1. Step Configuration — single-step or multi-step
2. Name and Description — what participants and team members see
3. Categories — how this pathway is grouped and filtered
4. Custom Fields — pathway-wide data you want captured on every enrollment

Step Configuration first — it constrains everything after it.

Step Configuration

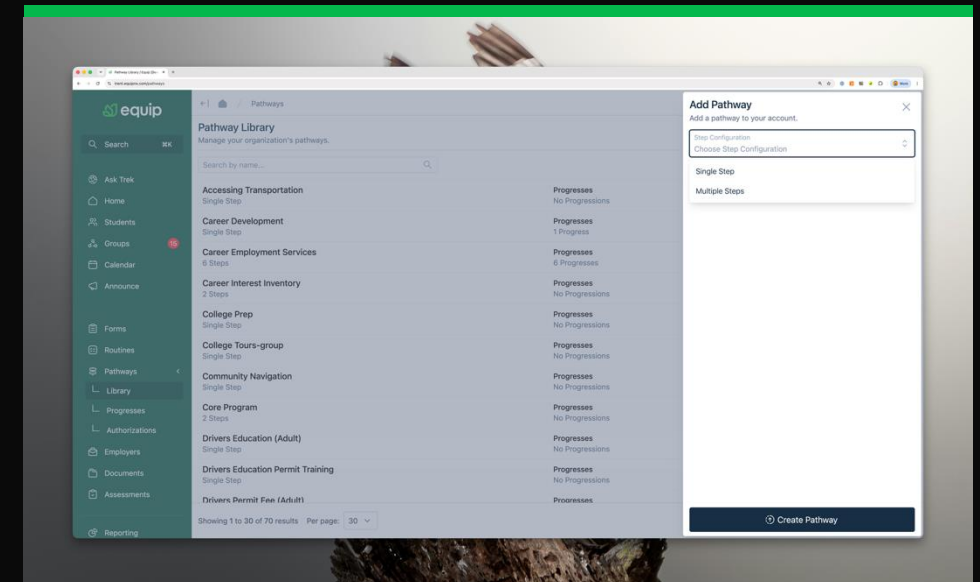
What it is Whether this pathway is a single service or a sequence of steps

Options Single Step · Multiple Steps

When you set it At creation

If Single Step The pathway and the step are effectively the same thing; the participant's enrollment includes it automatically

If Multiple Steps You name the first step during creation and add the rest afterward; each step is included or excluded per participant



PATHWAY SETTINGS

Name and Description

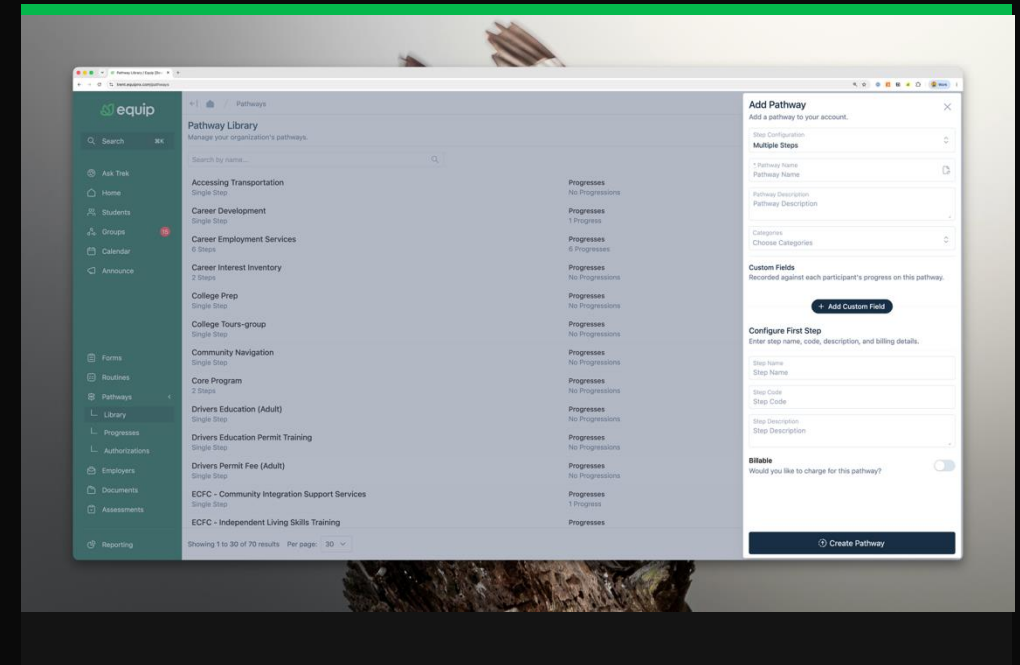
What it is The label team members see in every dropdown, filter, and report column.

Name it for the service "Admissions & Onboarding" — not "Pathway 1" and not a team member's name.

Description Internal guidance. Say who this pathway is for and when to enroll someone on it.

Why it matters Renaming later updates every existing enrollment — but reports you've already exported keep the old label.

Name it for the service, not the cohort or the year.



Categories

What it is A grouping label applied to the pathway, used to organise and filter.

Where it shows up Pathway lists, the Linked Activity filters, and report groupings.

How to use it Group by service area — Admissions, Career, Independent Living — not by team or funder.

Watch out Categories are shared across the account. Renaming one changes it everywhere it is used.

Categories are how a director slices the report. Choose them from that end.

Pathway Custom Fields

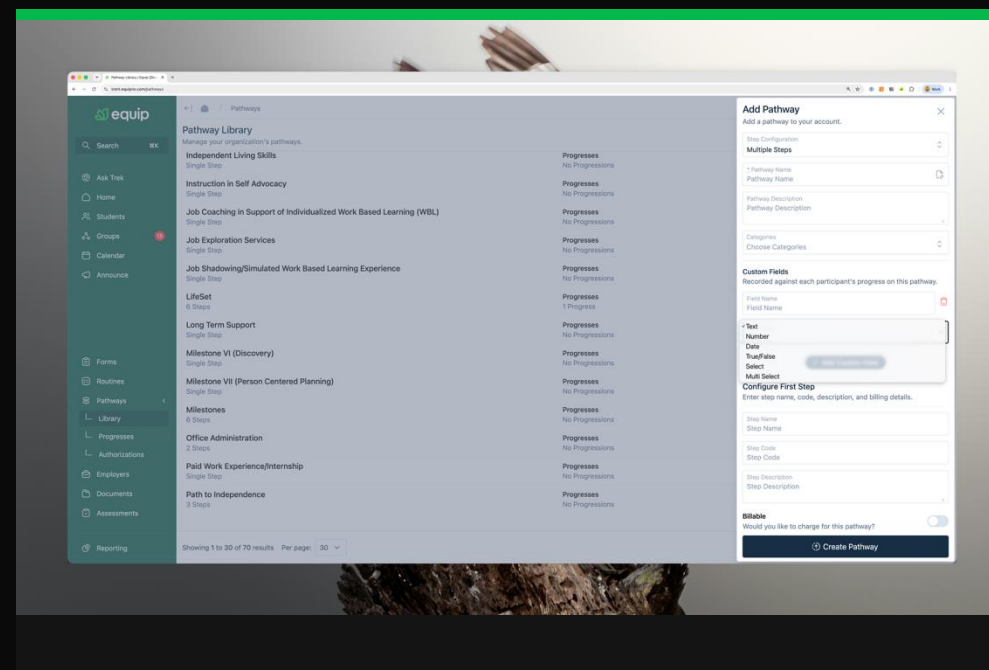
What it is Extra fields captured once per enrollment, for data that applies to the whole pathway.

Good examples Referral source, funding stream, cohort, primary supporter.

Bad examples Anything that changes as the participant advances — that belongs on a step.

Hard constraint Deleting a date custom field destroys every value already recorded against it. There is no undo.

Deleting a date field destroys recorded values. Hide it instead if you're unsure.



Step-level settings

Configured per step. Every participant who reaches the step inherits them.

1. Name, Code, and Description
2. Moving a step to another pathway — and when you can't
3. Step Custom Fields
4. Billable, Price, and Price By

Steps are ordered. The order is the sequence participants follow.

STEP SETTINGS

Step Name, Code, and Description

Name What team members see on the enrollment and in the Linked Activity page. Name it as a stage, not a task.

Code A short identifier used in exports and integrations. Keep it stable — downstream systems key off it.

Description Guidance for the team member: what has to be true before this step is considered complete.

Rule of thumb If two steps have the same completion criteria, they are one step.

Name steps as stages — "Assessment", not "Send the assessment form".

Moving a step to another pathway

You can move it

No participant has recorded progress on the step.

The step's pathway field is still editable — reassign it and the step moves cleanly.

You cannot move it

Any participant has progress recorded on the step.

The pathway field locks. Recorded progress would otherwise point at a pathway the participant was never on.

Workaround: create the step on the target pathway and retire the original. History stays intact.

This is the single most common "why can't I edit this?" ticket we receive.

Step Custom Fields

What it is Fields captured against a participant's progress on one specific step.

Good examples Assessment score, placement site, interview date, approval reference.

Pathway or step? If the answer changes as the participant advances, it is a step field. If it is fixed at enrollment, it is a pathway field.

Same constraint Deleting a date field here also destroys the values recorded against it.

Ask: does this answer change as they move? Yes → step field. No → pathway field.

STEP SETTINGS

Billable, Price, and Price By

Visibility These fields only appear if authorizations are enabled on your account. If you don't see them, that's why.

Billable Marks the step as chargeable. Non-billable steps still track normally — they just don't carry a rate.

Price The rate applied when the step is billed.

Price By Whether the rate applies per unit, per hour, or per occurrence.

No authorizations on your account? These three fields are hidden, not missing.

Pathway Dates

Account-level. Two bookend dates frame every enrollment.

Receive Date

When the referral or request arrived — before any work started.

This is the clock that funders usually care about.

Meeting Date

When the participant was actually first seen.

The gap between the two is your responsiveness measure.

Configured once for the account — every pathway uses the same two date fields.

Relabel them to match your funder's language before rollout, not after.

Days Between Goal and Total Days Goal

Days Between Goal Target number of days a participant should spend on any one step before moving on.

Total Days Goal Target duration for the whole enrollment, start to finish.

What they do They are targets, not limits. Nothing blocks or auto-advances when a goal is exceeded — the enrollment is flagged in reporting.

Set them from data Run the pathway unset for a term, look at your actual medians, then set the goal.

Targets, not limits. Nothing is blocked when a goal is missed.

Discharge Reasons

What it is The controlled list a team member picks from when a participant leaves a step before completing it.

Account-level One shared list across every pathway. You cannot vary it per pathway or per step.

Keep it short Eight to twelve reasons. Long lists get answered inconsistently and the data stops meaning anything.

Distinguish Separate participant-initiated exits from programme-initiated ones — that distinction is what funders ask about.

This list is the vocabulary of every exit conversation. Write it carefully.

DEMO

Building a pathway, start to finish

LIVE DEMO

PART 4

Running a pathway

Enrollment, progress, discharge, and closure — and how they differ.

Enrolling a participant

Participant Who is being enrolled. One participant can be on several pathways at once.

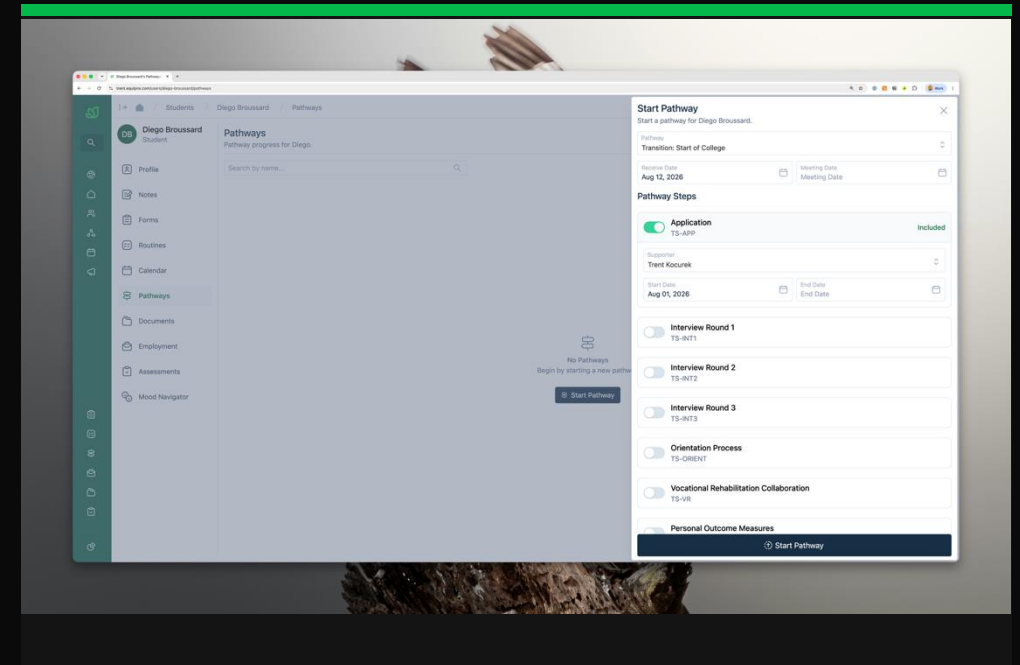
Pathway Which pathway they are joining. Fixed at enrollment.

Dates Receive Date and Meeting Date, using your account labels.

Assigned team member Who owns this enrollment. Drives the "my caseload" filters.

Custom fields Whatever you configured at the pathway level.

One participant, several pathways — that's normal and expected.



Progress is derived, not set

Nobody picks a status. It is calculated from the dates on each step.

Not started

No entered date recorded on the step.

In progress

An entered date exists. No completed date yet.

Completed

Both an entered date and a completed date exist.

Fix a wrong status by fixing the dates. There is no status field to override.

Enrollment-level progress rolls up from the steps beneath it.

Discharge

Step-level. The participant left this step without completing it.

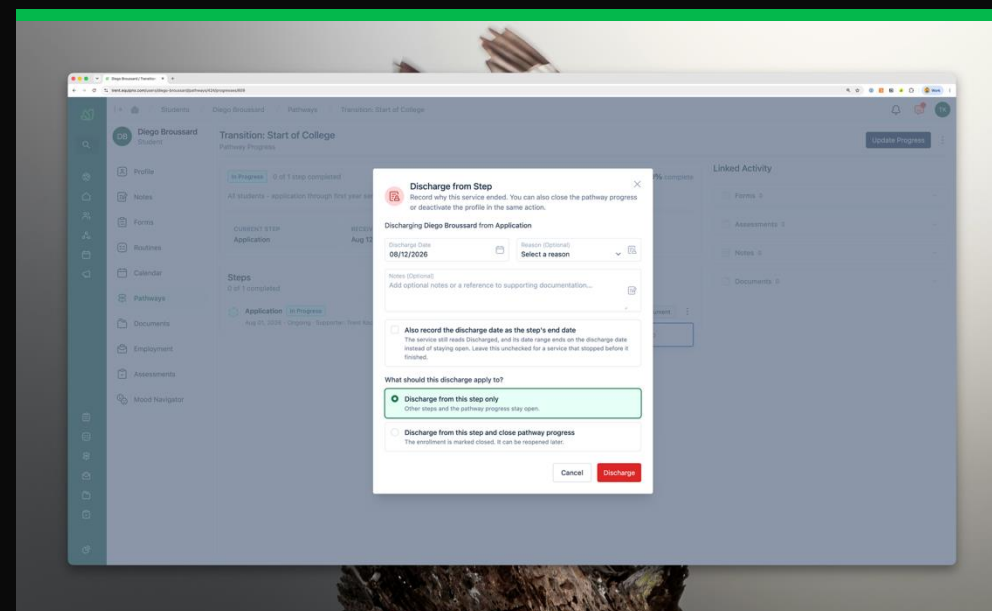
What it records A reason from your account list, free-text notes, and a discharge date.

Scope It applies to the step, not the enrollment. The rest of the pathway is unaffected.

Discharge is not completion A discharged step never counts toward completion figures. This distinction is the point of the feature.

Reversible Correcting a discharge is an edit, not a delete — the record stays.

Discharge ≠ completion. Ever. That is the whole reason it exists.



Closure

Enrollment-level. The participant is finished with this pathway.

What closure does

Ends the enrollment and stops the clock on the Total Days goal.

The enrollment stays visible and reportable.

What closure does not do

It does not change the participant's profile status.

Someone can be closed on one pathway and active on three others.

Closure is per enrollment. The participant record is untouched.

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

DEMO

Running a participant through a pathway

LIVE DEMO

PART 5

Pathway Centralization

Linking goals, notes, forms, assessments, and documents to the step they belong to.

The idea

The work already exists. Centralization is about attaching it to the point in the pathway where it happened.

- Before: a note is a note, filed by date, findable only if you know when it was written
- After: a note is attached to Step 2 of this participant's Admissions pathway
- One page answers "what has happened on this pathway, and where"

Nothing new to write. Same artifacts, connected to the structure.

What can be linked

Goals

Outcome targets set with the participant.

Notes

Case notes and contact records.

Forms

Intake, consent, referral, review.

Assessments

Structured evaluations and scores.

Documents

Uploads and files.

Not yet linkable

Events and Routines are deliberately held back from the linking UI while we finalise how recurrence maps onto a single step. They are on the roadmap.

Five artifact types today. Events and Routines are coming.

Pathway precision or step precision

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

Linked to the pathway

Relevant to the whole enrollment, not one stage.

Consent forms, the overall goal, the signed agreement.

Shows on the enrollment regardless of current step.

Linked to a step

Produced during one specific stage.

The assessment run at Application, the note from the Decision meeting.

Shows against that step in the timeline.

Step-level linking is what makes duration and bottleneck reporting possible.

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

PART 5 · CENTRALIZATION

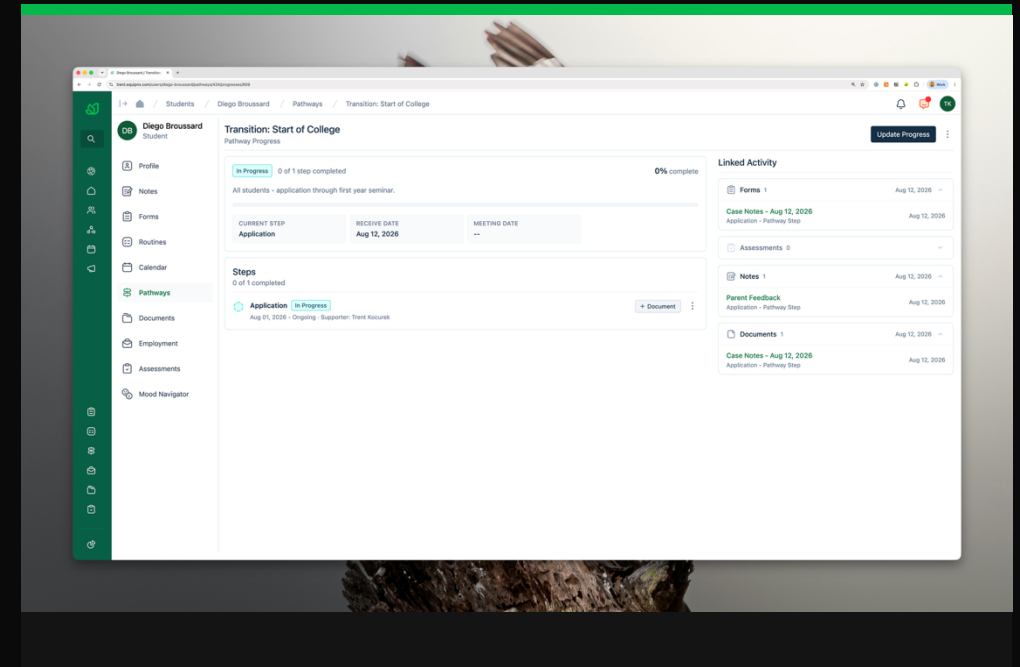
The Linked Activity page

What it is One page per enrollment showing every linked artifact in the order it happened.

Grouped by step Pathway-level links sit at the top; step links sit under the step they belong to.

Who uses it Team members picking up a caseload, supervisors reviewing, and anyone preparing for a meeting.

The test A new team member should be able to open this page and know what to do next.



This is the page that replaces "let me go and ask someone".

Filtering linked activity

- By artifact type — show only assessments, or only documents
- By step — show everything that happened during Application
- By date range — narrow to a review period or a funder reporting window
- By author — see what one team member recorded across the enrollment
- Combine filters to answer a specific question, then export what's left

Filters are how you turn a timeline into an answer.

Report columns

Pathway data is available as columns in your existing reports.

Column	What it answers
Current step	Where is each participant right now?
Days on current step	Who has stalled, measured against the Days Between goal?
Total days on pathway	Who is running past the Total Days goal?
Discharge reason	Why are participants leaving, and at which step?

Build the report once, save it, and let the numbers refresh themselves.

Consolidated export

What it produces One file containing the enrollment, its steps, and every linked artifact reference.

What it is for Funder reporting, audit responses, and handing a complete record to an external reviewer.

Respects your filters Filter the Linked Activity view first, then export — you get exactly what you were looking at.

Before you delete anything Export first. This is the safety net for the destructive actions on the next slide.

Filter first, then export. The export mirrors what's on screen.

Deletion guards

What the system stops you doing, and what it will happily let you destroy.

Blocked for you

Moving a step that has recorded progress.

Removing a pathway with active enrollments on it.

Deleting a discharge reason that is in use.

Allowed, and destructive

Deleting a date custom field destroys every recorded value.

Deleting a step removes its links.

Neither can be undone by us.

The guards cover structure, not data. Export before you delete a field.

DEMO

Centralization in practice

LIVE DEMO

PART 6

Rollout

Availability, a four-week plan, the mistakes to avoid, and a config you can copy.

Availability

Pathways Available on all accounts. If you have Equip, you have pathways.

Pathway Centralization Behind an account-level setting. Ask us to enable it and we will turn it on for your account.

Billable settings Visible only where authorizations are enabled.

Events and Routines linking Not yet available. On the roadmap, no date committed.

Can't see Linked Activity? It's gated. Email us and we'll enable it.

A four-week plan

Week 1

Agree your discharge reason list and date labels.

Map one service onto paper before touching the system.

Week 2

Build that one pathway.
Leave the day goals unset.

Enroll three real participants, not test data.

Week 3

Start linking notes and forms to steps.

Review the Linked Activity page as a team and fix the naming.

Week 4

Set day goals from real medians.

Build the report. Then start pathway two.

One pathway, real participants, four weeks. Then repeat.

The failure mode is building eight pathways in week one and abandoning all of them by week three.

Five mistakes to avoid

1. Building a pathway per cohort instead of per service — fragments your reporting permanently
2. Writing steps as tasks rather than stages — you end up with thirty steps and no signal
3. Using discharge to mean completion — quietly destroys your completion rate
4. Setting day goals at launch by guesswork — set them from real medians after a term
5. Linking everything at pathway level because it's quicker — you lose all step-level insight

Every one of these is cheap to fix in week one and expensive in month six.

Copy this starter configuration

Admissions & Onboarding — a working config you can build on Monday.

Setting	Value	Why
Pathway name	Admissions & Onboarding	Named for the service, not the term
Step configuration	Multi-step	Four genuinely distinct stages
Steps	Inquiry · Application · Decision · Orientation	Stages, each with its own artifacts
Pathway custom field	Referral Source	Fixed at enrollment, never changes
Step custom field	Decision Outcome, on Decision	Only meaningful at that stage

Day goals: leave unset for one term, then set from your own medians.

What to take away

- A pathway is the shape of a service, configured once and reused
- Progress is derived from dates — there is no status field to set
- Discharge is a step. Closure is an enrollment. Neither touches the participant profile
- Link to the step, not the pathway, whenever the artifact belongs to a stage
- Export before you delete anything with data in it

Start with one pathway and three real participants.

Questions

Common ones we'll cover if nobody asks:

- Can a participant be on two pathways at once?
- Can I reorder steps after participants are enrolled?
- What happens to linked artifacts if I delete a step?
- Can I report across several pathways at once?

Appendix slides cover the answers in detail.

Thank you

Recording, slides, and the starter configuration will be sent to everyone registered.

Settings reference — pathway level

Setting	What it controls	Constraint
Step Configuration	Single-step or multi-step	Hard to reverse once enrollments exist
Name	Label in dropdowns, filters, reports	Renaming updates existing enrollments
Description	Internal guidance for team members	None
Categories	Grouping for filters and reports	Shared across the account
Custom Fields	Data captured once per enrollment	Deleting a date field destroys values

Settings reference — step and account level

Setting	Level	Constraint
Step Name	Step	None
Step Code	Step	Keep stable — used in exports
Step Custom Fields	Step	Date field deletion destroys values
Billable / Price / Price By	Step	Visible only with authorizations enabled
Pathway Dates	Account	Two fields, shared by every pathway
Days Between / Total Days	Account	Targets only — nothing is enforced
Discharge Reasons	Account	One shared list; cannot delete one in use

How status is derived

Entered date	Completed date	Resulting status
Empty	Empty	Not started
Set	Empty	In progress
Set	Set	Completed
Set	Empty, discharge recorded	Discharged — never counts as completed

To correct a status, correct the dates. There is no status field.

Discharge versus closure

	Discharge	Closure
Applies to	One step	The whole enrollment
Means	Left the step unfinished	Finished with this pathway
Records	Reason, notes, date	End of the enrollment
Counts as completion	No	Depends on final step status
Affects participant profile	No	No

Terminology

Term	Meaning
Participant	The person receiving support. Never "student" or "client".
Team member	Staff member working in Equip.
Supporter	A family member, guardian, or advocate connected to a participant.
Pathway	The configured shape of a service.
Enrollment	One participant on one pathway.
Step progress	One participant's record against one step.