

This Chart is intended to provide a general overview of the pathway an agency and client take as STEPS to Care is implemented. For an exhaustive list of all tools, please "view all topics by step" on your dashboard.

PREPARE FOR CLIENTS

AGENCY PREPARES FOR IMPLEMENTATION PD

Relevant Forms and Protocols:

- 📄 Agency Readiness Assessment
- 📄 Budget Toolkit
- 📄 Key Components Checklist
- 📄 Sample Confidentiality Protocol
- 📄 Sample Field Safety Protocol
- 📄 Preview Guide and FAQs for Program Directors
- 📄 Staff Roles and Responsibilities

ELIGIBLE PATIENTS ARE IDENTIFIED CC

Relevant Forms and Protocols:

- 📄 Recommended Client Selection Criteria

HIV Services include:

- Case Finding

INTAKE CLIENTS

ENROLLMENT/CLIENT INTAKE CC

STEPS tools:

- 📄 Intake Assessment Form
- 📄 Logistics for Patient Navigation and Contact Information Form

HIV Services include:

- Intake Assessment

DELIVER SERVICES

CARE PLAN DEVELOPMENT PN

Relevant Forms and Protocols:

- 📄 Comprehensive Care Plan

HIV Services include:

- Comprehensive Care Plan Review

FIRST PATIENT NAVIGATION MEETING PN

Occurs 0-7 days after intake

Relevant Forms and Protocols:

- 📄 Adherence Assessment (Daily and Non-Daily)
- 📄 Intake Assessment Form completed (if necessary)
- 📄 MySTCtools.org/Client Workbook
- 📄 Reassessment Form (if necessary)
- 📄 Referrals/Appointments Tracking Log/Checklist
- 📄 Sample Scheduling Protocol
- 📄 Services Tracking Log

CLIENT IS PAIRED WITH PATIENT NAVIGATOR

Care Coordinator (CC) or Program Director (PD) pair client to a Patient Navigator (PN) based on availability and client preference (gender, language, etc.).

CORE TEAM COORDINATION BEGINS CC

Relevant Forms and Protocols:

- 📄 Care Team Meeting Form

HIV Services include:

- Comprehensive Care Plan Review
- Formal and Informal Care Team Meetings

ONGOING CLIENT MEETINGS PN

(Weekly/monthly/quarterly) Frequency of client meetings can increase or decrease as deemed clinically appropriate by the care team.

Relevant Forms and Protocols:

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|--|---|
| 📄 Adherence Assessment (Daily and Non-Daily) | 📄 Referrals/Appointments Tracking Log/Checklist |
| 📄 Client Schedule Tracker | 📄 Reassessment Form |
| 📄 Comprehensive Care Plan | 📄 Services Tracking Log |
| 📄 MySTCtools.org/Client Workbook | 📄 Weekly Schedule Tracker |

HIV Services include:

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|-----------------------------------|------------------------------|
| • Assistance with Social Services | • Accompaniment |
| • Entitlements/Benefits | • Outreach |
| | • Health Education/Promotion |

MISSED APPOINTMENTS OR DROP OUT CC

Relevant Forms and Protocols:

- 📄 Sample Missed Appointment
- 📄 Sample Outreach Protocol