

## A. KEY CASE RECORD FIELD DEFINITIONS

**CASE STATUS:** Indicates whether or not the client is actively working with a specific program.

⇒ **OPEN:** *client has been referred to the program, is in the intake/screening phase, OR is actively enrolled and receiving services.*

⇒ **CLOSED:** *client is no longer receiving services from program.*

**PROGRAM STATUS:** Describes the current status or stage of participation within a specific program. Program Status corresponds with Case Status.

|             | PROGRAM STATUS             | DEFINITION  | CoDa Requirements  | Completed by |
|-------------|----------------------------|---|--|--------------|
| OPEN CASE   | Referred<br><i>Default</i> | The new case record has a default Program Status of REFERRED. This indicates that no contact has yet been made with the client. | ✓ Relevant fields in REFERRAL section  | PD           |
|             | Intake                     | Change to INTAKE once they have scheduled the client for an intake.   | <ul style="list-style-type: none"> <li>✓ Relevant fields in INTAKE section</li> <li>✓ Intake Housing Tracker</li> <li>✓ Case Manager Name</li> <li>✓ Service Entries – all outreach and attempts<br/><i>(see complete list of Engagement Types)</i></li> </ul>   | PD           |
|             | Enrolled                   | Select Enrolled once the client has moved into housing.   | <ul style="list-style-type: none"> <li>✓ Enrolled Housing Tracker</li> <li>✓ Income Tracker</li> <li>✓ Upload files to CLIENT and CASE record</li> <li>✓ FAM</li> <li>✓ Goals</li> <li>✓ Room Occupancy</li> <li>✓ Service Entries – all outreach and attempts<br/><i>(see complete list of Engagement Types)</i></li> </ul> | CASE MANAGER |
| CLOSED CASE | Not Enrolled               | The client does not move into the Margot for any reason and is exited from the program.   | <ul style="list-style-type: none"> <li>✓ Exit Date</li> <li>✓ Exit Reason – <i>see full list below</i></li> <li>✓ Client Exit Comments</li> </ul>  | CASE MANAGER |
|             | Exited                     | Exited means that the client has moved out of the Margot for any reason.  | <ul style="list-style-type: none"> <li>✓ Exit Date</li> <li>✓ Exit Reason – <i>see full list below</i></li> <li>✓ Client Exit Comments</li> <li>✓ Program Exit Housing Tracker</li> </ul>  | CASE MANAGER |

**EXIT REASON:** Explains why the family has “exited” a specific program. To *exit* a program means that the client is no longer receiving services from a specific program. The client may or may not continue to receive services through other Compass programs. Exit Reason corresponds with the specific Program Status.

|                     | EXIT REASON                 | DEFINITION   | Program Exit Housing Tracker Requirements |
|---------------------|-----------------------------|--|---|
| <b>NOT ENROLLED</b> | Ineligible                  | Client is determined not eligible at some point prior to moving in.  | N/A                                       |
|                     | Lack of contact             | Client does not complete intake due to lack of contact.  | N/A                                       |
|                     | No longer interested        | Client opts not to proceed with move-in after intake.  | N/A                                       |
|                     | Other                       | Client does not proceed with move-in for any other reason not captured here. Enter more details in the <i>Client Exit Comments field</i> .                         | N/A                                       |
| <b>EXITED</b>       | Abandonment                 | Client abandons the unit without notifying Compass staff.  | Any living situation                      |
|                     | Evicted/asked to leave unit | Client is evicted from the Margot for any reason.  | Any living situation                      |
|                     | Ineligible                  | Client is no longer eligible for a family subsidy at the Margot.   | Any living situation                      |
|                     | Voluntary Exit w/o Housing  | Client voluntarily moved out of the Margot without securing stable housing prior to exit.  | Any non-stable living situation           |
|                     | Transfer                    | Client transfers from the Margot into another PSH unit. Do NOT use if the client transfers into a single adult subsidy. Select instead <i>No Longer Eligible</i> . | Living Situation = PSH                    |
|                     | Found other housing option  | Client voluntarily exits from the Margot into another stable living situation other than PSH.  | Any stable living situation except PSH    |
|                     | Other                       | Use for any other reason not captured here. Enter more details in the <i>Client Exit Comments field</i> .  | Any living situation                      |

## B. KEY SERVICE ENTRY DEFINITIONS

**ENGAGEMENT TYPE:** Describes the nature or type of engagement you have with a client or 3<sup>rd</sup> party related to the client's case.

| ENGAGEMENT TYPE             | DEFINITION  |
|-----------------------------|---|
| <b>Case Management</b>      | Refers to any Case Manager engagement with the client for case management purposes. <i>Included in frequency/dosage.</i>  |
| <b>CAC Engagement</b>       | Client engages with the CAC specifically on topics related to the child(ren). <i>Included in frequency/dosage.</i>  |
| <b>Collateral Contact</b>   | Refers to a conversation or exchange of information with another service provider, case manager etc. in support of the client's case.   |
| <b>Wellness Check</b>       | Case Manager conducts a wellness check if a client has not been for 3 days, a wellness check will be conducted on the 4 <sup>th</sup> day.  |
| <b>Other<br/>(Non-CM)</b>   | This refers to actions or communications with your client outside of case management sessions. Some examples include phone calls and emails reminding a client of a meeting or scheduling a meeting, etc. |
| <b>Post-Exit Engagement</b> | Refers to any communication with the client AFTER they have exited the program.   |

**ENGAGEMENT METHOD:** Describes the specific method or “how” the Case Manager engaged with the client or 3<sup>rd</sup> party.

| ENGAGEMENT METHOD                       | DEFINITION  |
|---|---|
| <b>In-Person at residence</b>           | Use when you meet with the client in their home. <i>Participated? = YES</i>   |
| <b>In-Person at office</b>              | Use when you meet with the client in the office. <i>Participated? = YES</i>   |
| <b>In-Person at other agency office</b> | Use when you engage with a client at another agency/organization office. <i>Participated? = YES</i>   |
| <b>In-person in classroom</b>           | For CCC/CBHS use only.  |
| <b>In-Person in community</b>           | Select this option when you engage with the client at a site other than one of the Compass sites or the client’s residence. <i>Participated? = YES</i>                              |
| <b>Phone</b>                            | Use when you engage with the client by phone. <i>Participated? = YES</i>  |
| <b>Phone call, no message</b>           | Staff attempted to contact the client by phone and did not leave a message.   |
| <b>Left Message</b>                     | Staff left a voicemail/phone message for the client.  |
| <b>Video Session</b>                    | Use when you engage with the client over video (e.g. Zoom). <i>Participated? = YES</i>  |
| <b>Received Message</b>                 | Staff received a voicemail/phone message from the client. <i>Participated? = YES</i>  |
| <b>Email Conversation</b>               | Use this option to indicate back-and-forth email communication between the client and staff member within the same day (or several days if appropriate). <i>Participated? = YES</i> |
| <b>Sent Email</b>                       | Staff sent an email to the client.  |

|                          |  |
|--------------------------|--|
| <b>Received Email</b>    | Staff received an email from the client. <i>Participated? = YES</i>  |
| <b>Text conversation</b> | Refers to a series of back-and-forth text messages between the Case Manager and the Client. <i>Participated? = YES</i>   |
| <b>Text sent</b>         | Refers to an individual text sent to a client that does not receive a response.  |
| <b>Sent Letter</b>       | Staff sent a letter via post to the client.  |
| <b>No show</b>           | This is used to record when a client does not show up for their scheduled appointment and they do not inform the CM before their appointment that they will not be attending.  |
| <b>Cancelled</b>         | This is used when a scheduled appointment is cancelled. Please use the Progress Note box to indicate if the client cancelled or if the staff member cancelled and the reason, if known. For example: "Client cancelled meeting because she is not feeling well." If the client re-schedules for another time within the same week, you do NOT need to include a separate Service Entry with <i>Cancelled</i> as the <b>Engagement Type</b> . Instead, log the re-scheduled session the same as you would if the client had attended during their regularly scheduled time. |
| <b>Internal Note</b>     | Select if you wish to add a note related to the client's case that is intended for internal reference only.  |