CLARA HOUSE CASE RECORD WORKFLOW

COMPASS FAMILY SERVICES
Housing. Support. Hope.

REFERRAL SUBMITTED:
ONE SYSTEM

APD/PD opens new case in CoDa and assigns to Case Manager

OPEN CASE

OR
Client referred for childcare only.

Program Status = REFERRED *(default)*

CoDa Requirements (CM):
- ✓ *Case Manager Name*
- ✓ *REFERRAL & INTAKE sections*
- ✓ *Intake Housing Tracker*
- ✓ *Service Entries – all outreach and attempts*

Does client move into Clara House?

NO

YES

Program Status = ENROLLED

CoDa Requirements (CM):
- ✓ *ENROLLMENT DETAILS section*
- ✓ *Enrolled Housing Tracker*
- ✓ *Income Tracker*
- ✓ *Upload files to CLIENT and CASE record*
- ✓ *FAM*
- ✓ *Goals*
- ✓ *Room Occupancy*
- ✓ *Service Entries – all outreach and attempts*
- ✓ *Childcare tracker → IF client has child in childcare*

Program Status = CHILDCARE ONLY

CoDa Requirements (CM):
- ✓ *Childcare Tracker*

Client secures stable housing by exit?

YES

NO

CoDa Requirements (CM):
- ✓ *Exit Date*
- ✓ *Exit Reason*
- ✓ *Client Exit Comments*
- ✓ *Program Exit Housing Tracker*

CLOSED CASE

Program Status = DENIED

CoDa Requirements (CM):
- ✓ *Exit Date*
- ✓ *Client Exit Comments*

Program Status = CHILDCARE ONLY

CoDa Requirements (CM):
- ✓ *Exit Date*
- ✓ *Childcare Tracker (exit)*
- ✓ *Client Exit Comments*

Program Status = EXITED

Exit Reason = MOVED INTO/FOUND STABLE HOUSING

Exit Reason = NON-COMPLIANCE w/PROGRAM

Exit Reason = ABANDONED SHELTER

Exit Reason = REACHED MAX TIME w/o STABLE HOUSING

Updated September 2025