

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
OPEN CASE	REFERRED <i>Default</i>	Default status when a new CUAV case record is created.	<ul style="list-style-type: none"> ✓ Referral Details ✓ Case Manager
	INTAKE	Change to Intake once the client has been assigned a Case Manager and engages in the initial intake process to assess eligibility and placement needs.	<ul style="list-style-type: none"> ✓ Intake Section ✓ Intake Housing Tracker
	ENROLLED	Change to Enrolled once the client has been successfully placed in a hotel. The client will remain in this status until they are exited from the program.	<ul style="list-style-type: none"> ✓ Enrolled Housing Tracker ✓ FAM (quarterly) ✓ Income Tracker (quarterly) ✓ Goals (quarterly)
CLOSED CASE	NOT ENROLLED	The client does not end up being placed in a hotel after the initial referral or screening. You will also provide an “exit” Service Entry/Progress Note explaining the reason for exit.	<ul style="list-style-type: none"> ✓ Exit Date ✓ Exit Reason – see full list below ✓ Client Exit Comments – if applicable
	EXITED	Exited means that the client exits for any reason after being placed in a hotel and staying for at least one night. You will also provide an “exit” Service Entry/Progress Note explaining the reason for exit.	<ul style="list-style-type: none"> ✓ Exit Date ✓ Exit Reason – see full list below ✓ Client Exit Comments – if applicable ✓ Program Exit Housing Tracker

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
EXITED	Moved into/found stable housing	Client secured stable housing at exit, including: moved into PSH, found housing with short-term or permanent subsidy, moved in with friends/family, or other stable living situation.	<ul style="list-style-type: none"> ✓ Rental or Owned by Client, Market Rate Housing ✓ Rental or Owned by Client, Subsidized or BMR ✓ PSH ✓ Living w/Friends or Family (STABLE)
	Transfer	Client is transferred to another shelter or transitional housing, typically for reasons related to client safety.	<ul style="list-style-type: none"> ✓ Emergency Shelter ✓ DV Shelter ✓ Transitional Housing
	Non-compliance	The client is exited from the program due to non-compliance with program requirements and/or violation of program rules.	✓ Any living situation
	Abandonment	The client is exited from the program after abandoning their hotel room. Select when you have lost contact with the client and do not know their whereabouts after they leave the hotel.	✓ Any living situation
	Reached max time w/o stable housing	Client reached the end of their allotted time in the CUAV program without securing stable housing prior to exit.	✓ Any non-stable living situation
	Voluntary Exit w/No Housing Option	Client voluntarily exited the CUAV program without securing stable housing prior to exit.	✓ Any non-stable living situation
	Ineligible	The client has become ineligible (e.g. lost custody) AFTER staying at least one night in a hotel	✓ Any living situation
	Other	Select this option when none of the above options apply. Make sure to provide details in the “Client Exit Comments” field.	✓ Any living situation
NOT ENROLLED	Client refused placement	The client is not placed in a hotel because they decline the placement option for any reason.	
	Lack of contact	The client is not placed in a hotel due to lack of contact or non-response to the CUAV team.	
	Ineligible	The client is determined ineligible for services after the initial screening. Only select this option if the client was never placed in a hotel. Otherwise use Program Status = EXITED.	
	Other	Select this option when none of the above options apply. Make sure to provide details in the “Client Exit Comments” field.	

B. KEY SERVICE ENTRY DEFINITIONS

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

ENGAGEMENT TYPE	DEFINITION
Case Management	Refers to any Case Manager engagement with the client for case management purposes. <i>Included in frequency/dosage.</i>
Room Check	Refers to the routine room inspections to ensure participant compliance with the CUAV Program Agreement/Rules. Room checks are intended to maintain safety, cleanliness.
Wellness Check	Use to log scheduled or as-needed check-ins with participants to assess their physical, emotional, and overall well-being. Wellness checks help identify immediate needs, provide support, and ensure participant safety and stability.
Collateral Contact	Refers to a conversation or exchange of information with another service provider, case manager etc. in support of the client's case.
Other (Non-CM)	This refers to all other communications with the client that do not fall into the above categories.
Post-Exit Engagement	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 3rd party.

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

Received Email	Staff received an email from the client. <i>Participated? = YES</i>
Text conversation	Refers to a series of back-and-forth text messages between the Case Manager and the Client. <i>Participated? = YES</i>
Text sent	Refers to an individual text sent to a client that does not receive a response.
Sent Letter	Staff sent a letter via post to the client.
No show	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.
Cancelled	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 Engagement Type . Instead, log the re-scheduled session the same as you would if the client had attended during their regularly scheduled time.
Internal Note	Select if you wish to add a note related to the client's case that is intended for internal reference only.