

# CCAP

## CoDa Data Entry Checklist



### New Case/Intake

1

- Open a new case and make sure to fill out the following fields: *Intake Date, Screening/Intake Note, Cause of Homelessness, Referred from Compass Program, ONE System ID*
- Enter a Housing Tracker with "Stage" = INTAKE
- Log initial engagement or attempted engagement with the client as service entry - "Engagement Type" = SCREENING
- Enter all family members in the household
- If the family is not eligible for services, close the case and change the "Program Status" to EXITED. Otherwise, leave as SCREENING until the assessment has been completed.



### Housing Prioritization Assessment

2

- Log the assessment as a service entry with Engagement Type = ASSESSMENT
- Update key fields in the Housing & Shelter Referrals section on the case record (e.g. Shelter Status, Housing Prioritization Status)
- Update the "Program Status" to ENROLLED
- If the family does not complete an assessment or does not wish to enroll after the assessment, change the "Program Status" to EXITED.



### While Enrolled

3

- Log a service entry every time you engage (or attempt to engage) with the client - see *Engagement Type definitions in Zendesk for more details.*
- Update the "Shelter Status" to SHELTER REFERRAL COMPLETED if a referral was made to shelter or transitional housing and enter the date the referral was completed. *If you know that the client entered shelter/transitional housing, add a Housing Tracker with "Stage" = ENROLLED.*
- Update the "Housing Prioritization Status" to HOUSING REFERRAL COMPLETED or PSH REFERRAL COMPLETED if a referral was made to PSH or RRH and enter the date the referral was completed.
- Enter any problem-solving funds provided to the client as a Financial Transaction, with "Assistance Source" = PROBLEM-SOLVING FUNDS.



### Closing the Case

4

*Close the case if:*

- The family has moved into PSH or RRH (do not close after referral, must confirm move-in)
- The family has been successfully problem-solved and moving into stable living situation
- The family has entered shelter and is not in the queue for RRH or PSH

*Final data entry:*

- Enter a Housing Tracker with "Stage" = PROGRAM EXIT
- Change "Program Status" to EXITED and fill out the Exit Details section of the case record (e.g. Exit Date, Exit Reason, Client Exit Comments) - see *Zendesk for Exit Reason definitions.*