

## CODA DATA DICTIONARY: ENGAGEMENT METHOD & ENGAGEMENT TYPE

Save Save & New Cancel

Service Attributes

Program Name: Compass Aftercare

Engagement Type: --None--

Engagement Method: --None--

Duration (Minutes):

Drop-In Services Received

Available

- Diapers
- Mail
- Donations

Chosen

Service Time

Start Time: 9:00 AM

Date: 12/1/2023

Main Client Participation

Client

Joey Ramone TEST

Participated?: --None--

Units of Service: Time (Minutes)

- A. 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. For reporting and performance management purposes, the Engagement Type also indicates if the client received the intervention AND if the engagement should be counted for Frequency/Dosage (if applicable).
- **Frequency/Dosage:** A performance management metric for case management and behavioral health programs, *frequency* refers to “how often” the staff member communicates with the client (substantive communication related to meeting case goals) within a given time period (e.g. week, month, or quarter) and *dosage* refers to “how much” time is spent (e.g. 60 minutes, 120 minutes, etc.)
- B. ENGAGEMENT METHOD:** Describes the specific method or “how” the staff member, client, and/or 3<sup>rd</sup> party communicated or attempted to communicate. For reporting and performance management purposes, the Engagement Method also tells us if the communication should be considered STAFF and/or CLIENT engagement.
- **Staff engagement:** Staff member communicated or attempted to communicate with client (main client or other family member). Each program has its own requirements related to the frequency of staff engagement.
  - **Client engagement:** Client (main client or other family member) communicated or attempted to communicate with staff.
- C. PARTICIPATED?:** Indicates if the client or another family member was present for the interaction/communication
- **YES:** main client or another family member was present
  - **NO:** no family members were present



**IMPORTANT!** For an interaction to be considered Client Engagement and/or Frequency/Dosage, “Participated?” must = **YES**.

A. ENGAGEMENT TYPE	DEFINITION	Relevant Programs	Frequency/Dosage? <i>(if client participated)</i>
<b>1<sup>st</sup> ELSF Match Outreach</b>	Refers to the first time the Case Manager contacts or attempts to contact the client after the client has received an ELSF match.	CCSS	YES
<b>Assessment</b>	Refers to engagement by the Housing Problem Solving Specialist to conduct the Housing Referral Assessment for Coordinated Entry.	CCAP	N/A
<b>CAC Engagement</b>	Refers to any substantive support provided to clients or their children by the Children’s Activities Coordinator (CAC). This does not include activities, classes, workshops, etc. provided by the CAC which would instead be logged as a <i>Group &amp; Class</i> .	CFS, The Margot	YES
<b>Case Management</b>	Refers to substantive engagement with the client for case management purposes and working towards case management goals.	ALL Case Management Programs	YES
<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.	ALL	NO
<b>Counselor of the Day</b>	This refers to a session you did with a client as Counselor of the Day. <i>Review the COD Data Entry Guidelines for more details.</i>	CBHS	NO
<b>Drop-In</b>	Use when the sole reason for the engagement is to pick up drop-in goods (e.g. diapers, food, etc.) You must also indicate the specific type of drop-in services received. If the client receives drop-in goods as part of a case management, therapy session, or other substantive engagement, use that Engagement Type instead.	CFRC, CFS, CCH, The Margot	NO
<b>Initial Outreach</b>	Refers to the first staff contact or outreach attempt after the client has been referred to the program.	CCSS	NO

<b>Family Advocacy</b>	Refers to one-off or ad hoc support or advocacy provided by the FRC (e.g. accompaniments to appointments, assistance with applications or forms, resource navigation support, etc.)	CFRC	N/A
<b>Housing Search</b>	Refers to engagement specifically related to housing search.	C-Rent, C-HOME, C-CARES	YES
<b>Monthly Outreach</b>	Refers to engagement with the client for the purpose of scheduling the monthly check in. Do not use to track monthly check ins, instead select Case Management (or Recertification if applicable)	C-HOME	NO
<b>Other (Non-CM)</b>	This refers to general actions or communications with your client outside of case management, therapy, and other types of substantive engagement already covered in this document. These interactions are typically administrative in nature. Some examples include phone calls and emails reminding a client of a meeting or scheduling a meeting, helping the client with AAF, etc.	All case management programs	NO
<b>Other (Non-Therapy)</b>		CBHS	NO
<b>Other Outreach Attempt</b>		CCAP	N/A
<b>Other Parent Meeting</b>		CCC	N/A
<b>Parent Collateral</b>		This refers to any type of communication you have with the parent of a child you are seeing for child therapy or shadowing. This is distinct from Family Therapy sessions which have their own <b>Engagement Type</b> – see <a href="#">Therapy Appointment – Family</a> .	CBHS
<b>Parent Education</b>	Refers to 1:1 engagement with the Parent Educator while the client is in Program Status = Parent Education.	CFRC	N/A

<b>Problem-Solving Conversation</b>	<i>Problem-solving</i> is a specific intervention provided by CCAP which involves identifying potential stable housing options outside of the homeless response system. Select this option when engaging in problem-solving support with the client.	CCAP	N/A
<b>Post-Exit Engagement</b>	Refers to any communication with the client AFTER they have exited the program. <i>See the Guidelines on Post-Exit Engagement for more details.</i>	ALL	NO
<b>Recertification</b>	Use this code when engaging with the client for the specific purpose of recertification for the subsidy.	C-HOME, C-CARES	YES
<b>Referral</b>	Refers to communication with the client related to placement in shelter, transitional housing, PSH, and referrals to RRH.	CCAP	N/A
<b>Room Check</b>	Use this code when the engagement involves visiting the motel/hotel room to check that the client is complying with program requirements related to room upkeep.	CUAV	YES
<b>Screening</b>	Any engagement related to conducting the initial intake or screening of client needs and eligibility that occurs prior to program enrollment.	Multiple	NO
<b>Shelter Wellness Assessment</b>	Refers to the initial wellness assessment conducted by the in-house therapist at Compass Family Shelter for all new families entering shelter to determine mental health needs and potential for enrollment in therapy.	CFS	NO
<b>Speech Screening</b>	This refers to meetings with the Speech & Language Pathologist at CCC to determine if in-house speech therapy is appropriate for the child.	CCC	N/A
<b>Speech Therapy</b>	This refers to individual speech therapy sessions with the Speech & Language Pathologist at CCC.	CCC	N/A

<b>Therapy appointment – Individual</b>	This refers to individual therapy sessions. If the client cancels or does not show up to their scheduled Therapy Appointment, you should still select this as the <b>Engagement Type</b> and then you will select <a href="#">Cancelled</a> or <a href="#">No Show</a> as the <b>Engagement Method – see next section</b> . This applies to all types of therapy appointments (Individual, Child, Couple, and Family).	CBHS	YES
<b>Therapy appointment – Child</b>	This refers to child therapy and play therapy sessions. This does not include shadowing sessions at CCC.	CBHS	YES
<b>Therapy appointment – Couple</b>	This refers to therapy sessions with a couple.	CBHS	YES
<b>Therapy appointment – Family</b>	This refers to therapy sessions with a family.	CBHS	YES
<b>Therapy appointment – Shadowing</b>	This refers to shadowing sessions conducted at Compass Children’s Center.	CBHS	YES
<b>Wellness Check</b>	Use this code when the staff member visits the client’s room/hotel room to check on the client’s safety and/or wellbeing.	CUAV, The Margot	YES

B. ENGAGEMENT METHOD	DEFINITION	Client Engaged?	Staff Engaged?
<b>In-Person at residence</b>	Staff member meets with the client in person at the client's residence, including shelter room, hotel room, apartment, house, etc.	YES	YES
<b>In-Person at office</b>	Staff member meets with the client in person at one of the Compass offices/sites, including Family Shelter, Clara House, the Margot, 37 Grove, etc.	YES	YES
<b>In-Person at other agency office</b>	Staff member meets with a client at another agency/organization office.	YES	YES
<b>In-person in classroom</b>	(CBHS/CCC only) Staff member meets with a client or client's child in the classroom at CCC.	YES	YES
<b>In-Person in community</b>	Staff member meets with a client in person at a site that is NOT one of the Compass sites, another agency office, or the client's residence.	YES	YES
<b>Phone</b> <i>(Replaced Phone Call &amp; Phone Session)</i>	Staff member communicates with client over the phone.	YES	YES
<b>Video</b>	Staff member communicates with the client over video (Zoom, FaceTime, etc.)	YES	YES
<b>Left Message</b>	Staff member attempts to call a client and leaves a message.	NO	YES
<b>Received Message</b>	Staff member receives a missed call and voicemail message from a client.	YES	NO
<b>Placed call, no message</b>	Staff member attempts to call a client and is unable to leave a message.	NO	YES

<b>Sent Email</b>	Use to log an email sent to a client that does not immediately result in a back-and-forth email conversation.	NO	YES
<b>Received Email</b>	Use to log an email received from a client that does not immediately result in a back-and-forth email conversation.	YES	NO
<b>Email conversation</b>	Use to log back-and-forth emails between the staff member and the client.	YES	YES
<b>Text conversation</b>	Refers to a series of back-and-forth text messages between the staff member and the client. <i>This code is auto-generated by Salesforce.</i>	YES	YES
<b>Text sent</b>	Refers to an individual text sent to a client that does not receive a response. <i>This code is auto-generated by Salesforce. Does not include BULK text messages.</i>	NO	YES
<b>Sent Letter</b>	Staff member sends a letter to the client through snail mail.	NO	YES
<b>No show</b>	The client does not show up for their scheduled appointment and they do not inform the staff member in advance.	NO	NO
<b>Cancelled</b>	A session/meeting with the client is cancelled and the client does NOT re-schedule for another time within the same week. 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 session because she is not feeling well." If the client re-schedules for another time within the same week, you do NOT need to log the cancelled session. Instead, log the re-scheduled session the same as you would if the client had attended during their scheduled time.	NO	NO
<b>No Session</b>	(CBHS only) Use when no session was scheduled (e.g. you have a planned vacation, you only see the client every other week, etc.) This may only be used when the skipped session is planned and should not be used for unplanned or one-off cancellations or no shows. Use instead "Cancelled" or "No Show."	NO	NO
<b>Internal Note</b>	Use to log any relevant activities or information related to the client's case that occurred outside of an engagement with the client or collateral. Use Engagement Type = OTHER (Non-CM, Non-Therapy, etc.)	NO	NO

