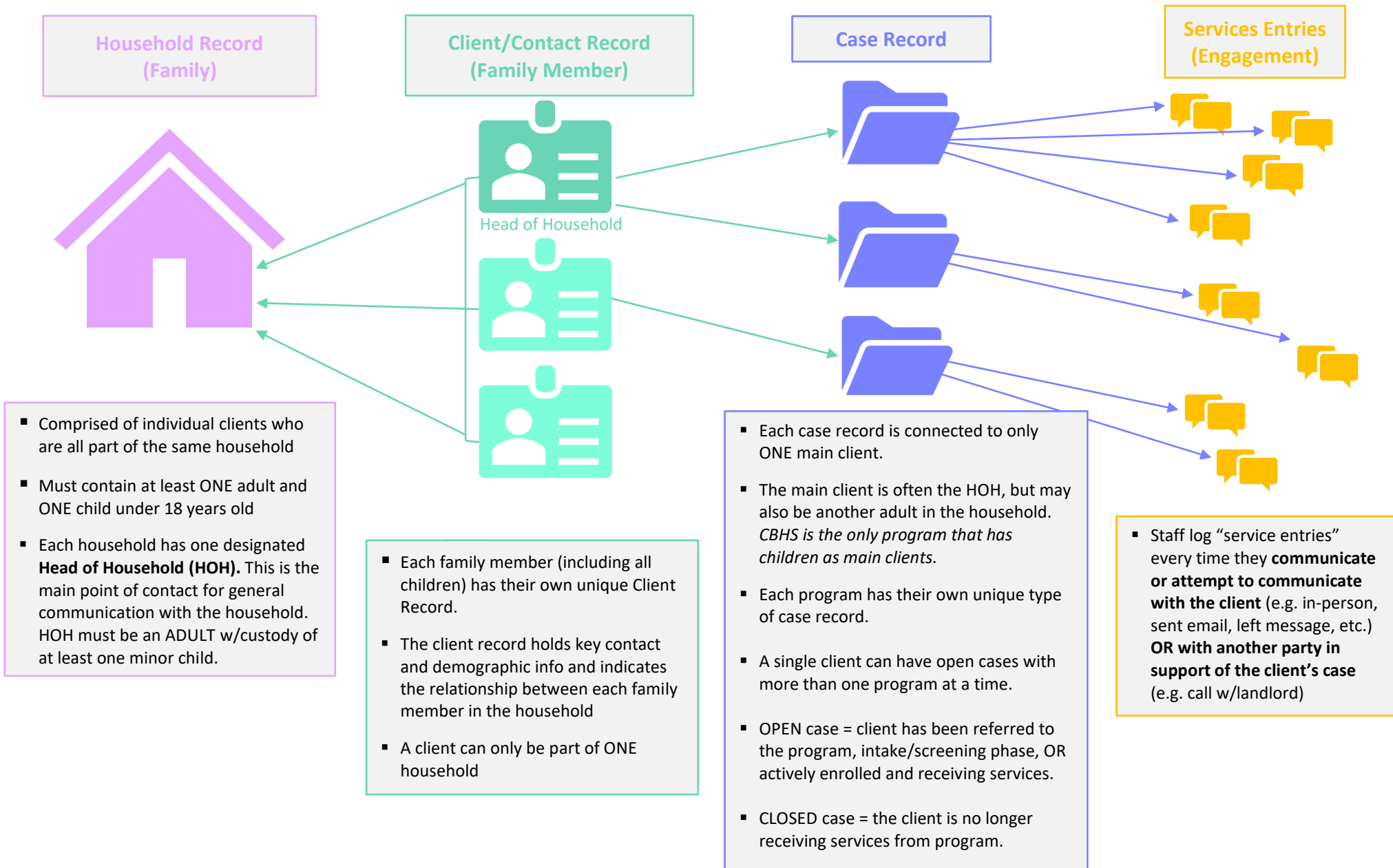


Compass uses Salesforce as its case management database, also affectionately called “CoDa.” Salesforce organizes information into different types of records. Each record type has a unique role and contains information related to that role. **This document introduces the record types most often used by Case Managers and Therapists and describes how they are used and their relationship to each other.**



Here's an **example of the Salesforce record structure** using our test client Joey Ramone:

