CBHS CASE RECORD WORKFLOW

REFERRAL SOURCE:

a. Compass Program → CoDa
b. HSH Sites → online referral
c. COD or Wellbeing Assessment – *see COD & Wellbeing Protocols*

PD/APD creates new Case Record or case record automatically created with CoDa referral

CoDa Requirements:
Referral Details

Program Status = Referred
(default when new case is created)

PD assigns staff member to conduct initial screening

Program Status = Screening

CoDa Requirements:
Housing Tracker (Stage = Intake)
Program Type = HSH or Non-HSH Contract

Client confirms interest and availability for therapy

YES → Program Status = Pending Assignment

NO → Program Status = Not Enrolled

Therapist found to match client availability, language, and other considerations?

YES → PD assigns Therapist to case

NO → Program Status = Waiting List

Program Status = Transitioning to New Therapist

PD assigns Therapist to case

Program Status = Assigned

Client attends therapy session?

YES → Program Status = Enrolled

NO → Program Status = Not Enrolled

CoDa Requirements:
Checklist + Docs
WHOQOL (Quarterly)
Therapy Impact Scale (Quarterly
Weekly Service Entry

IF: Client opts to pause therapy for more than 1 month

IF: Therapist leaves Compass and client opts to work with new therapist

Program Status = Exited

CoDa Requirements:
Exit Details

EXIT REASON =
Client Availability
Ineligible
No longer interested
Lack of Contact
Therapy not indicated
COD Completed
Wellbeing Assessment Completed
Referred Out
Other

EXIT REASON =
Treatment goals completed

EXIT REASON =
No longer eligible
Client Availability
Referred Out
Other

EXIT REASON =
Therapist no longer at Compass
Did not meet attendance requirements
No longer interested
Lack of Contact

CoDa Requirements:
Exit Details
Housing Tracker (Stage = Program Exit)
Therapy Impact Scale