

CBHS DATA DICTIONARY: PROGRAM STATUS & EXIT REASON

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 process of enrolling, 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
OPEN CASE	Referred	When a new client is referred by a Compass staff member or a new case is created by CBHS, the case record automatically defaults to Referred. Referred indicates that the case is new and has not yet been reviewed by the CBHS team.	
	Screening	This is the first stage of engagement with a new client. Select this status while the CBHS staff member conducts the initial screening with the client to assess the client’s interest and availability to participate in therapy.	
	Waiting List	The client will be placed on the Waiting List if the CBHS team is at capacity and cannot provide therapy at the time of referral OR if the client opts to pause therapy for an extended period of time (more than 1 month) and intends to resume. If the client is unsure about resuming therapy after the break, the client should be “exited” instead. (See Closed Case section)	
	Pending Assignment	Select this status after the client has been screened and while they are waiting to be assigned to a particular therapist. This status may be skipped if the client is assigned immediately after screening.	
	Assigned	Select this status once a specific therapist has been assigned to the client. The assigned therapist should change the status to ENROLLED once they have completed their first therapy session with the client or NOT ENROLLED if the client does not end up attending a therapy session.	
	Enrolled	Once the client has completed the intake process with their assigned therapist and completed all required paperwork, change the client’s status to ENROLLED. They will remain in this status for the duration of their time in therapy unless they are placed on the WAITING LIST or TRANSITIONING TO A NEW THERAPIST (see description).	
	Transitioning to New Therapist	The client is in the process of transitioning to a new therapist after having attended at least one therapy sessions with another therapist. This typically occurs when a therapist leaves Compass and the client wishes to continue therapy with CBHS. The new therapist should change the status to ENROLLED once they have completed their first session with the client.	
	COD Follow Up	Select only if the Referral Type (CBHS) = COD. This status indicates that a COD session has been completed and CBHS leadership should review to determine if additional follow up is needed.	

CLOSED CASE	Not Enrolled	Use this status if the client does not end up enrolling in therapy for any reason. The number of therapy sessions should always be equal to zero. Use the Exit Reasons to indicate why the client was not enrolled. You will also provide an “exit” Service Entry/Progress Note explaining the reason for exit.
	Exited	Exited means that the client is no longer receiving therapy services from CBHS after having attended one or more therapy sessions. This status is used ONLY for clients who were enrolled in therapy and have exited after at least one therapy session. Use the Exit Reasons to indicate why the client exited. You will also provide an “exit” Service Entry/Progress Note explaining the reason for exit.

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
NOT ENROLLED	Client availability		Client is not available/has a scheduling conflict and is unable to commit to therapy at the time of referral. This option refers to the client's availability and is NOT to be used if CBHS is at capacity and does not have available therapists at the time of referral. In these cases, the client will typically be put on the Waitlist.
	COD Completed		Client has received support from a Counselor of the Day and does not end up enrolling in therapy.
	Ineligible		Client is not eligible for CBHS services at the time of intake (e.g. client does not have custody of a minor child, client is not living in San Francisco at intake, etc.)
	Lack of contact		After initial referral, CBHS staff are unable to reach client or unable to complete intake process due to lack of contact or engagement.
	No longer interested		Client chooses not to proceed (e.g. not ready to commit, too much going on, etc.) after some initial communication or completing intake process with CBHS staff.
	Referred Out		The client is referred to another support service (e.g. substance abuse treatment center) and has not received any therapy sessions with CBHS.
	Therapy not indicated		After initial communication or completing intake process, CBHS staff determine that therapy is contraindicated and/or client may need a different or higher level of care (e.g. couples work may not be appropriate, actively abusing substances, OT, ABA, etc.)
	Wellbeing Assessment completed		Specifically applies to CCH/CFS clients after the wellbeing assessment has been completed and client does not enroll in therapy.

EXITED	Client availability	Client is no longer available/has a scheduling conflict that makes them unable to continue with therapy at this time (e.g. client starts work, school, etc.)
	Did not meet attendance requirements	Client has inconsistent engagement/attendance. This option is distinct from "Lack of Contact" because it assumes that the therapist and client have been in communication about the attendance requirements and lack of engagement.
	Family moved	The client opts to end therapy with CBHS because they have moved out of San Francisco/Bay Area.
	Lack of contact	The client is unreachable or unresponsive after multiple attempts by the therapist to make contact.
	No longer interested	Client chooses not to proceed with therapy after at least one therapy session (e.g. client is not ready, too much going on, etc.)
	No longer eligible	Client becomes ineligible for therapy services after at least one therapy session (e.g. youngest child turns 18 and they need to transition out and start a new Adult Individual case, lost custody of child, etc.)
	Referred out	The client is referred to another support service (e.g. substance abuse treatment center) after receiving at least one therapy session.
	Therapist no longer at Compass	Client opts not to continue therapy due to their therapist leaving Compass. Typically, the client will be provided a new therapist and the original case will remain open with a new assigned therapist.
	Treatment goals completed	Client and therapist agree to end therapy because the client has made significant progress towards therapy/treatment goals. <i>Includes CPS case closed.</i>
	Other	Use this category sparingly when the client's reason for exit does not fall into one of the above categories. Make sure to provide an "exit" Service Entry/Progress Note explaining the reason for exit.