

COMPASS FAMILY SHELTER DATA DICTIONARY

A. KEY CASE RECORD FIELD DEFINITIONS

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 intake/screening phase, 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	CoDa Requirements	Completed by
OPEN CASE	Intake <i>Default</i>	INTAKE indicates that the client has been referred from an access point and has not yet completed the intake process or moved into shelter. This is the default program status once a new CFS case record has been created.	<ul style="list-style-type: none"> ✓ Case Manager Name ✓ Relevant fields in INTAKE section ✓ Intake Housing Tracker ✓ Service Entries – <i>(see complete list of Engagement Types)</i> 	PD or APD <i>(CM or RC may also open case)</i>
	Enrolled	Once the client has completed the intake process and moved into shelter, change the client’s status to ENROLLED . They will remain in this status for the duration of their time in shelter.	<ul style="list-style-type: none"> ✓ Relevant fields in ENROLLMENT DETAILS section ✓ Enrolled Housing Tracker ✓ Income Tracker ✓ Upload files to CLIENT and CASE record ✓ FAM ✓ Goals ✓ Room Occupancy ✓ Service Entries – all outreach and attempts <i>(see complete list of Engagement Types)</i> 	Case Manager
CLOSED CASE	Not Enrolled	If the client does not end up moving into shelter for any reason after the initial intake, change their status to NOT ENROLLED .	<ul style="list-style-type: none"> ✓ Exit Date ✓ Client Exit Comments 	Case Manager
	Exited	EXITED means that the client has moved out of shelter. Use the Exit Reasons to indicate why the client exited.	<ul style="list-style-type: none"> ✓ Exit Date ✓ Exit Reason – <i>see full list below</i> ✓ Client Exit Comments ✓ Program Exit Housing Tracker 	Case Manager

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	Program Exit Housing Tracker Requirements
EXITED	Found Permanent Housing	Client secured stable housing, including: moved into PSH, found housing with short-term or permanent subsidy, moved in with friends/family, or other stable living situation.	<ul style="list-style-type: none"> ✓ Rental or Owned by Client, Market Rate Housing ✓ Rental or Owned by Client, Subsidized or BMR ✓ PSH ✓ Living w/Friends or Family (STABLE)
	Voluntary exit w/no housing option	Client voluntarily moved out of shelter without securing stable housing prior to exit.	<ul style="list-style-type: none"> ✓ Any non-stable living situation
	Transfer	Client is transferred to another shelter or transitional housing, typically for reasons related to client safety.	<ul style="list-style-type: none"> ✓ Emergency Shelter ✓ DV Shelter ✓ Transitional Housing
	Reached max time w/o stable housing	Client reached the end of their allotted time at shelter without securing stable housing prior to exit.	<ul style="list-style-type: none"> ✓ Any non-stable living situation
	Abandoned shelter	Client abandons shelter/moves out without informing shelter staff.	<ul style="list-style-type: none"> ✓ Any living situation
	Client was given permanent DOS	DOS stands for “denial of service” which means that the client must leave shelter due to rule violation. <ul style="list-style-type: none"> • “Permanent” indicates that the DOS is permanent and they are unable to return to shelter. <i>This may be reviewed 1 year after exit.</i> • “Non-permanent” indicates that client may be able to return to shelter within a designated period of time. <i>Varies based on the specific rule violation.</i> 	<ul style="list-style-type: none"> ✓ Any living situation
	Client was given non-permanent DOS		

B. KEY SERVICE ENTRY DEFINITIONS

SERVICE ENTRY FORM: indicates which service entry form you will use to log engagement with the client.

- ⇒ **CFS Engagement and Services** - use to log all services provided and engagement with the client and family members, except the Wellness Assessment.
- ⇒ **Wellness Assessment** – this is utilized by the onsite therapist ONLY to track wellness assessments conducted with families living in shelter.

ENGAGEMENT TYPE: Describes the nature or type of engagement you have with a client or 3rd party related to the client’s case.

ENGAGEMENT TYPE	DEFINITION
Case Management	Refers to any Case Manager engagement with the client for case management purposes. <i>Included in frequency/dosage.</i>
CAC Engagement	This refers to communication between the parent/caregiver and the Children’s Activities Coordinator (CAC) related to child development and wellbeing. This does not include the child or parent’s participation in children’s activities (see Groups & Classes). <i>Included in frequency/dosage.</i>
Collateral Contact	Refers to a conversation or exchange of information with another service provider, case manager etc. in support of the client’s case.
Drop-In	Select when the client picks up drop-in items from shelter and no other services were provided. You will also need to indicate the type of drop-in services received. If the Case Manager provides drop-in items during a case management meeting, select Engagement Type = Case Management and indicate the type of drop-in services received on the Case Management service entry.
Other (Non-CM)	This refers to actions or communications with your client outside of case management sessions. Some examples include phone calls and emails reminding a client of a meeting or scheduling a meeting, etc.
Post-Exit Engagement	Refers to any communication with the client AFTER they have exited the program.

ENGAGEMENT METHOD: Describes the specific method or “how” the therapist engaged with the client or 3rd party.

ENGAGEMENT METHOD	DEFINITION
In-Person at residence	Use when you meet with the client in their home. <i>Participated? = YES</i>
In-Person at office	Use when you meet with the client in the office. <i>Participated? = YES</i>
In-Person at other agency office	Use when you engage with a client at another agency/organization office. <i>Participated? = YES</i>
In-person in classroom	For CCC/CBHS use only.
In-Person in community	Select this option when you engage with the client at a site other than one of the Compass sites or the client’s residence. <i>Participated? = YES</i>
Phone	Use when you engage with the client by phone. <i>Participated? = YES</i>
Phone call, no message	Staff attempted to contact the client by phone and did not leave a message.
Left Message	Staff left a voicemail/phone message for the client.
Video Session	Use when you engage with the client over video (e.g. Zoom). <i>Participated? = YES</i>
Received Message	Staff received a voicemail/phone message from the client. <i>Participated? = YES</i>
Email Conversation	Use this option to indicate back-and-forth email communication between the client and staff member within the same day (or several days if appropriate). <i>Participated? = YES</i>
Sent Email	Staff sent an email to the client.

Received Email	Staff received an email from the client. <i>Participated? = YES</i>
Text conversation	Refers to a series of back-and-forth text messages between the Case Manager and the Client. <i>Participated? = YES</i>
Text sent	Refers to an individual text sent to a client that does not receive a response.
Sent Letter	Staff sent a letter via post to the client.
No show	This is used to record when a client does not show up for their scheduled appointment and they do not inform the CM before their appointment that they will not be attending.
Cancelled	This is used when a scheduled appointment is cancelled. 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 meeting because she is not feeling well." If the client re-schedules for another time within the same week, you do NOT need to include a separate Service Entry with <i>Cancelled</i> as the Engagement Type . Instead, log the re-scheduled therapy session the same as you would if the client had attended during their regularly scheduled time.
Internal Note	Select if you wish to add a note related to the client's case that is intended for internal reference only.