CCSS CASE RECORD WORKFLOW

REFERRAL SOURCE:
a. Compass Program → CoDa
b. Client – submits ELSF app

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

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

PD assigns staff member to conduct initial screening

Program Status = Screening

CoDa Requirements:
Intake/Referral Information
Housing Tracker (Stage = Intake)

Client meets eligibility requirements and submits documents

NO

Client eligible for childcare through other programs?

YES

NO

Case Manager assigned to case

YES

Program Status = Initial Search

Client secures childcare placement

YES

NO

CoDa Requirements (CM):
Childcare Tracker – Placement
Quarterly FAM
Quarterly Income Tracker

Program Status = Enrolled

If client is actively searching for new childcare provider

Program Status = Enrolled/Searching

CoDa Requirements
Exit Details

Program Status = Not Enrolled

Program Status = Exited

CoDa Requirements (CM):
Exit Details
Housing Tracker (Stage = Program Exit)
Childcare Tracker (Status = Ended) *(see CCSS CoDa Guidelines for complete list of Childcare End Reasons)*

Exit Reason = Referred *(see CCSS CoDa Guidelines for complete list of Referred To options)*

Exit Reason = Childcare needs fulfilled

Exit Reason = Not eligible

Exit Reason = No longer interested

Exit Reason = Lack of Contact

Exit Reason = Referred *(see CCSS CoDa Guidelines for complete list of Referred To options)*

Exit Reason = Lack of Contact

Exit Reason = No longer interested

Exit Reason = Not eligible