

## 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	<b>Referred</b> <i>Default</i>	<b>REFERRED</b> indicates that the client has been referred from an access point and has not yet moved into Clara House. This is the default program status once a new CCH case record has been created.	<ul style="list-style-type: none"> <li>✓ Case Manager Name</li> <li>✓ Relevant fields in REFERRAL and INTAKE Details sections</li> <li>✓ Service Entries – <i>(see complete list of Engagement Types)</i></li> </ul>	PD or APD <i>(CM may also open case)</i>
	<b>Enrolled</b>	Once the client has completed the intake process and moved into Clara House, change the client’s status to <b>ENROLLED</b> . They will remain in this status for the duration of their time at Clara House.	<ul style="list-style-type: none"> <li>✓ Relevant fields in ENROLLMENT Details section</li> <li>✓ Housing Tracker (Intake + Enrolled)</li> <li>✓ Income Tracker (quarterly)</li> <li>✓ Upload files to CLIENT and CASE record</li> <li>✓ FAM (quarterly)</li> <li>✓ Goals (quarterly)</li> <li>✓ Workforce Tracker (Intake)</li> <li>✓ Childcare Tracker (if child is enrolled at CCH/Helen Hawk)</li> <li>✓ Room Occupancy</li> <li>✓ Service Entries – <i>(see complete list of Engagement Types)</i></li> </ul>	Case Manager
	<b>Childcare Only</b>	Use only for clients who have a child enrolled in CCH/Helen Hawk Childcare but are NOT residing at Clara House. If the client moves out of Clara House but continues with childcare, you will need to create a new case record with the CHILDCARE ONLY status. Clients residing at Clara House AND receiving childcare will have the ENROLLED program status.	<ul style="list-style-type: none"> <li>✓ Childcare Tracker (enrolled)</li> </ul>	Childcare Coordinator
CLOSED CASE	<b>Childcare Only</b>	Use only for non-resident clients who are exiting their child from childcare. No exit reason required.	<ul style="list-style-type: none"> <li>✓ Exit Date</li> <li>✓ Client Exit Comments</li> <li>✓ Childcare Tracker (exit)</li> </ul>	Childcare Coordinator
	<b>Exited</b>	<b>EXITED</b> means that the client has moved out of Clara House. Use the <b>Exit Reasons</b> to indicate why the client exited.	<ul style="list-style-type: none"> <li>✓ Exit Date</li> <li>✓ Exit Reason – <i>see full list below</i></li> <li>✓ Client Exit Comments</li> <li>✓ Workforce Tracker (Program Exit)</li> <li>✓ Housing Tracker (Program Exit)</li> </ul>	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.

EXITED	EXIT REASON	DEFINITION	Program Exit Housing Tracker Requirements
	<b>Moved into/found stable housing</b>	Client secured stable housing at exit, 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"> <li>✓ <i>Rental or Owned by Client, Market Rate Housing</i></li> <li>✓ <i>Rental or Owned by Client, Subsidized or BMR</i></li> <li>✓ <i>PSH</i></li> <li>✓ <i>Living w/Friends or Family (STABLE)</i></li> </ul>
	<b>Reached max time w/o stable housing</b>	Client reached the end of their allotted time at Clara House without securing stable housing prior to exit.	✓ <i>Any non-stable living situation</i>
	<b>Abandonment</b>	Client abandons Clara House/moves out without informing staff.	✓ <i>Any living situation</i>
	<b>Non-compliance with program</b>	Client has to move out of Clara House due to non-compliance with program rules/requirements.	✓ <i>Any living situation</i>

## 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 3<sup>rd</sup> party related to the client’s case.

ENGAGEMENT TYPE	DEFINITION
<b>Case Management</b>	Refers to any Case Manager engagement with the client for case management purposes. <i>Included in frequency/dosage.</i>
<b>Childcare Meeting</b>	This refers to communication between the parent/caregiver and the Childcare Coordinator related to child development, wellbeing, and engagement in childcare. <i>Included in frequency/dosage.</i>
<b>Collateral Contact</b>	Refers to a conversation or exchange of information with another service provider, case manager etc. in support of the client’s case.
<b>Drop-In</b>	Select when the client picks up drop-in items from Clara House 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.
<b>Afterschool Engagement</b>	This refers to communication between the parent/caregiver and the Afterschool Coordinator related to child development, wellbeing, and engagement in afterschool activities. <i>Included in frequency/dosage.</i>
<b>Other (Non-CM)</b>	This refers to all other actions or communications with your client outside of case management sessions and the other engagement types listed here.
<b>Post-Exit Engagement</b>	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 3<sup>rd</sup> party.

ENGAGEMENT METHOD	DEFINITION
<b>In-Person at residence</b>	Use when you meet with the client in their home. <i>Participated? = YES</i>
<b>In-Person at office</b>	Use when you meet with the client in the office. <i>Participated? = YES</i>
<b>In-Person at other agency office</b>	Use when you engage with a client at another agency/organization office. <i>Participated? = YES</i>
<b>In-person in classroom</b>	For CCC/CBHS use only.
<b>In-Person in community</b>	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>
<b>Phone</b>	Use when you engage with the client by phone. <i>Participated? = YES</i>
<b>Phone call, no message</b>	Staff attempted to contact the client by phone and did not leave a message.
<b>Left Message</b>	Staff left a voicemail/phone message for the client.
<b>Video Session</b>	Use when you engage with the client over video (e.g. Zoom). <i>Participated? = YES</i>
<b>Received Message</b>	Staff received a voicemail/phone message from the client. <i>Participated? = YES</i>
<b>Email Conversation</b>	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>
<b>Sent Email</b>	Staff sent an email to the client.

<b>Received Email</b>	Staff received an email from the client. <i>Participated? = YES</i>
<b>Text conversation</b>	Refers to a series of back-and-forth text messages between the Case Manager and the Client. <i>Participated? = YES</i>
<b>Text sent</b>	Refers to an individual text sent to a client that does not result in a text conversation.
<b>Sent Letter</b>	Staff sent a letter via post to the client.
<b>No show</b>	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.
<b>Cancelled</b>	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 <b>Engagement Type</b> . Instead, log the re-scheduled session the same as you would if the client had attended during their regularly scheduled time.
<b>Internal Note</b>	Select if you wish to add a note related to the client's case that is intended for internal reference only.