

C-WORK

CoDa Exit Checklist



Update Intervention Tracker

1

- Open the current "Intervention Tracker" and update
- Change the "Status" to EXITED, add the "Exit Date", "End Reason" and "End Details"
- Select any applicable outcomes in the "Outcomes Detail" field



Add NEW Employment Tracker

2

- Add a NEW "Employment Tracker" (Type of Workforce Tracker) with Stage = PROGRAM EXIT



Update ECE Course Tracker *(if applicable)*

3

- Open the current "ECE Course Tracker" (Type of Workforce Tracker) and update
- Make sure to update the "Status" and enter the "End Date"
- If known, enter the "Attendance" (e.g. # out of #) and Grade (letter or #)



Update Internship Tracker *(if applicable)*

4

- Open the current "Training/Intervention Tracker" (Type of Workforce Tracker) and update
- Make sure to update the "Status" and enter the "End Date"



Close Out Pending Goals *(if applicable)*

5

- Update the "Goal Progress" for each pending goal and add the "Actual Completion Date."



Add NEW Housing Tracker

6

- Add a NEW "Housing Tracker" with "Housing Stage" = PROGRAM EXIT



Confirm that you aren't missing...

7

- Outbound referrals
- Updated "Income Tracker" with most recent income details (within the FQ)
- Any service entries/progress notes



Close the Case

8

- Change the "Case Status" to CLOSED and "Program Status" to EXITED
- Enter the "Exit Date" and "Exit Reason" and add details in the "Client Exit Comments" field