

This document provides definitions and data entry guidelines **specifically for the CCSS staff**. Visit the [Compass Knowledge Base](#) for complete instructions on all CoDa case management functions.

I. CASE RECORD:

A. CASE INFORMATION SECTION

CASE NAME: Contains the main client's First/Last Name, Program Acronym, and Month/Year the case was opened. Auto-created by Salesforce.

CASE MANAGER: Identifies the CCSS staff member who will be providing case management on the case. This role is assigned by the CCSS PD/APD after the initial screening to determine client eligibility and needs.

PROGRAM MATCHES PRIMARY PROGRAM: This is automatically checked by Salesforce if CCSS is the primary program. If checked, the Case Manager is responsible for the following every quarter: 1) FAM, 2) Income Tracker

ELSF ID: This number is automatically assigned to the client when they first submit an application through Early Learning San Francisco (ELSF). The staff member who completes the client screening will enter this number into CoDa.

1st ELSF MATCH DATE: This is the date the client is matched with potential childcare providers by ELSF. The Case Manager or staff member who completes the screening will input this information.

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 does not end up receiving services OR 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. The following program statuses are used with the CCSS case record.

	PROGRAM STATUS	DEFINITION	CoDa Requirements
OPEN CASE	REFERRED <i>Default</i>	Default status when a new CCSS case record is created. Referred indicates that the CCSS team has not yet engaged with the client.	ELSF ID
	SCREENING	Change to Screening once the client has been assigned a Case Manager and engages in the initial intake process to determine needs and next steps	Intake/Referral Information section completed Intake Housing Tracker
	INITIAL SEARCH	The client completed the screening process and has been assigned a Case Manager. The client does not have children enrolled in childcare and is currently searching.	Case Manager
	ENROLLED	Select Enrolled once the client has secured a childcare placement.	Childcare Placement Tracker Contact Frequency
	ENROLLED/SEARCHING	Change the status to Enrolled/Searching if the client has an active childcare placement and is searching for a new placement – for a different child and/or if they are unsatisfied with the current placement.	
CLOSED CASE	NOT ENROLLED	The client does not end up receiving services from CCSS after the initial referral or screening. You will also provide an “exit” Service Entry/Progress Note explaining the reason for exit.	Exit Date Exit Reason – see full list below
	EXITED	The client is no longer receiving services from CCSS after having been assigned a Case Manager.	Exit Date Exit Reason – see full list below Program Exit Housing Tracker Childcare Placement Tracker (ENDED – see list of childcare end reasons below)

B. INTAKE/REFERRAL INFORMATION SECTION

REFERRAL DATE: Refers to the date the referral was made to CCSS, either through ELSF or by another Compass program.

REFERRED FROM COMPASS PROGRAM: If the referral was made by another Compass program, the referring staff person will enter the name of their program. If the referral comes directly from ELSF, select Compass Childcare Support Services.

REFERRED FROM STAFF: Enter the name of the staff person who made the referral.

REFERRAL REASON/NOTES: Provide detail about the initial need and reason for the referral.

INTAKE DATE: Refers to the date the CCSS staff person conducts the initial intake with the client.

CALWORKS ELIGIBLE: Indicate if the client is eligible for a childcare subsidy through CalWorks. Options include:

- **YES** – the client is eligible and will be referred out to CalWorks. Exit the client and select Exit Reason = Referred to CalWorks.
- **NO** – the client is not eligible for CalWorks. Proceed with the intake as usual.
- **Unknown** – the staff member does not know if the client is eligible at the time of the initial intake. Proceed with the intake as usual.

CALWORKS NOTES: Add any relevant notes related to the client's CalWorks eligibility.

CONTACT FREQUENCY: Indicates the frequency with which the Case Manager is expected to contact the client. Select the appropriate frequency based on the client's time with CCSS as well as need. This field must be filled out as soon as the client is enrolled in CCSS (Program Status = Enrolled). The Case Manager should update this field as needed. FAM and Income Tracker requirements are relevant for clients with "Quarterly" and "High Need" frequency.

- **Quarterly** – For clients who have been enrolled with CCSS (based on the most recent Childcare Placement Start Date) for one year or less.
- **Biannually** – For clients who have been enrolled with (based on the most recent Childcare Placement Start Date) CCSS for 1-2 years.
- **As needed** – For clients who have been enrolled with (based on the most recent Childcare Placement Start Date) CCSS for 2+ years.
- **High Need** – For any clients determined to need more frequent support from case managers, regardless of time in the program.

C. EXIT DETAILS SECTION

The Case Manager will complete this section when the client is exiting the 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 DATE: Date the client exits the program.

EXIT REASONS: Explains why the family has “exited” a specific program. Exit Reason corresponds with the specific Program Status. The chart below defines the exit reasons used with the CCSS case record.

CLIENT EXIT COMMENTS: This field allows the CM to provide more details about the reason for exit, if needed.

	EXIT REASON	DEFINITION
NOT ENROLLED	Ineligible	Client is found to be ineligible for CCSS services – e.g. does not have custody of minor child or does not reside in San Francisco county. Do NOT select if the client has other subsidy options and is referred out by CCSS.
	No longer interested	Client does not wish to proceed with the initial search for any reason.
	Lack of contact	Client has not responded to or been in contact with the Case Manager in any capacity (e.g. phone, email, in-person) after at least 3 follow-up attempts.
	Referred	Client is eligible for other childcare options and is referred out prior to being assigned a case manager. If the client is referred out after being assigned a Case Manager, choose EXITED, with exit reason CHILDCARE NEEDS FULFILLED. Options include: <ul style="list-style-type: none"> - <i>Referred to CalWorks</i> - <i>Referred to Wu Yee</i> - <i>Referred to Children’s Council</i> - <i>Referred to SFUSD</i> - <i>Referred Out – select if above options do not apply</i>
EXITED	Lack of contact	Client has not responded to or been in contact with the Case Manager in any capacity (e.g. phone, email, in-person) after at least 3 follow-up attempts. If you are able to confirm that the child is regularly attending childcare, select “Childcare Needs Fulfilled” instead.
	No longer interested	Client is no longer interested in continuing to receive support from CCSS for any reason and childcare needs have not been fulfilled through CCSS. If you the client has successfully secured a childcare placement and they no longer need Case Management support from CCSS, select “Childcare Needs Fulfilled” instead.

	No longer eligible	Client is no longer eligible to receive support from CCSS and childcare needs have not been fulfilled through CCSS.
	Childcare Needs Fulfilled	<p>The family no longer requires support from CCSS when either of the following options are true:</p> <p>All children requiring childcare have secured or been referred to childcare and the family does not need any additional support from CCSS:</p> <p>All children requiring childcare have transitioned to one of the following:</p> <ul style="list-style-type: none"> ✓ SFUSD or private or out-of-county kindergarten ✓ Headstart, Wu Yee or Children’s Council ✓ Other subsidy (e.g. Title V, Calworks, State)

II. RECORDING ENGAGEMENT: Service Entries & Progress Notes

[Click here for](#) instructions on how to enter Service Entries/Progress Notes.

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
Initial Outreach	Coordinator uses this engagement type for the FIRST attempt to contact the client after they have been referred to CCSS, regardless of whether or not the attempt has been successful. This status should ONLY be used once per case record. Any subsequent outreach attempts or contact with the client during the Screening phase should be coded as “Screening.”
1st ELSF Match Outreach	Case Manager or Coordinator uses this engagement type for the FIRST attempt to contact the client after they have received their first ELSF match, regardless of whether or not the attempt has been successful. This status should ONLY be used once per case record. Any subsequent outreach attempts or contact with the client should be coded as “Screening” or “Case Management” depending on the client’s program status.
Screening	Coordinator will select “Screening” to track all outreach attempts and engagement following the “Initial Outreach.” This engagement type corresponds with the “Screening” Program Status and is used while the Coordinator is screening the client to determine eligibility and interest in the program.
Case Management	Refers to any engagement with the client for case management purposes while the client is enrolled in the program. <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.
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, helping the client with AAF, 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 Case Manager engaged with the client or 3rd party.

ENGAGEMENT METHOD	DEFINITION
In-Person at residence	Use when you meet with the client in their hotel room. <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 hotel room. <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.

III. LOGGING CHILDCARE PLACEMENTS:

[Click here for instructions](#) on how to log childcare placements.

CHILDCARE END REASON: Explains why a particular childcare placement has been ended. The childcare end reason is specific to each child enrolled in childcare. Ending a childcare placement does NOT mean that the client exits CCSS. CCSS will continue to work with the client until their childcare needs have been fulfilled or they exit for any of the reasons listed above in the [Exit Reason chart](#).

CHILDCARE END REASON	DEFINITION	REASON FOR CHILDCARE END (Expanded)	Automatic Program Exit?	Corresponding Exit Reason
No longer eligible	Client is no longer eligible to receive childcare support through CCSS. <i>Do NOT select for children who have aged out of childcare – instead select “Transitioned”</i>	Moved out of SF	Yes	NO LONGER ELIGIBLE
		Lost custody of child		
Transitioned	The childcare placement has ended because the child has transitioned to kindergarten or other stable childcare option outside of CCSS.	Transitioned to SFUSD/other private kindergarten	No <i>The client may still be enrolled in CCSS if another child is still currently in need of childcare.</i>	CHILDCARE NEEDS FULFILLED <i>If no other children are in need of childcare</i>
		Transitioned to Headstart		
		Transitioned/switched to preferred provider		
		Transitioned to WY/CC		
		Transitioned to another subsidy		

Ended by Client	The client opts to end the childcare placement due to any of these options. The client will continue to remain enrolled with CCSS to find a different childcare placement.	Distance	<i>The client may remain enrolled and will continue to search for a new childcare provider (if desired)</i>	NO LONGER INTERESTED <i>If client does not wish to continue searching for new provider</i>
		Schedule		
		Language		
		Not good fit/unable to meet child needs		
		No longer interested in childcare		
		Provider/parent conflict		
Ended by Provider	The childcare provider opts to end the childcare placement due to any of these options. The client will continue to remain enrolled with CCSS to find a different childcare placement.	No longer providing service	<i>The client may remain enrolled and will continue to search for a new childcare provider (if desired)</i>	NO LONGER INTERESTED <i>If client does not wish to continue searching for new provider</i>
		Parent/provider conflict		
		No show/absences/out of contact		
		Not good fit/unable to meet child needs		
		Non-compliance with provider policies/procedures		
		Never started care		
Unknown/unable to confirm	Case Manager does not know or is not able to confirm the reason for childcare end. This scenario typically occurs when a client is exited due to lack of contact.		Yes	NO LONGER INTERESTED LACK OF CONTACT OTHER

