

HMIS New User Training - Activity 3.2

-- Adding a Case Note --

Adding Case Notes and Service Units is critical for a variety of reasons ranging from, but not limited to:

1. Serving and protecting the client.
2. Protecting yourself and your agency.
3. Documenting program and client progress for reports critical to management and funding.

Adding case notes, even when they are not required by your specific program, can seem cumbersome, but getting into the habit of taking detailed, professional notes is critical to accomplishing the three goals listed above. Remember, HMIS and ClientTrack are not specific to your agency or program. That's one reason why avoiding "duplicate clients" and recording information via case notes and services is so critical.

In this activity, we're going to go back and use the intake you just created for your mock client. During a first encounter with a client, a client often shares information about their situation that goes beyond what is required for the enrollment workflow. That information can be critical, not just for your agency or yourself or for reporting, but for any other agency that may serve this client in the future. Below are some key points to keep in mind when writing and maintaining case notes.



Here is some information your client shared with you during your first encounter. Don't worry if the details don't exactly line up with the intake details from your mock client (consistency is critical in the live environment, but since this is training, we'll favor practicing the process over continuity).

What you'll do is take this information and record it as a case note as shown in the 3.2 video you just watched. This case note will be specific to how you write it, however, if you need help or have questions, feel free to consult with your supervisor about how case notes should be completed for your specific program.

- Client has been sleeping in his Dodge Caravan for over a year.
- Client lived in an apartment in Athens, Georgia before becoming homeless, but can't remember his address or details about how much rent was. He remembers it was "about a year". When asked, the client says this is the first time he's ever been homeless, and it's causing a lot of pain in his right knee. When you follow up about the right knee, the client states hurt it a long time ago playing football, and isn't able to work, but is currently waiting for disability benefits.
- The client states he has had several misdemeanors, but they were "over a decade ago."
- Later during the intake, the client states he was an air conditioner repairman for 20 years before he got laid off because of his bad knee.
- Client says he receives "about \$995.00 a month from social security" and has SNAP benefits for "about \$300.00 a month, but maybe more, I can't remember." Veteran pays \$90 a month for his car insurance, \$45 in gas per week, and "around \$70 a month" for his cell phone with data service included.
- The client states he struggles with PTSD, and reported alcohol abuse in the past but has been "sober for over 10 years."
- Client states he doesn't have any outstanding legal issues, nor does he feel he has any unresolved legal issues from the past.
- Client owns a 2010 Dodge Caravan. It is in decent shape, but the veteran reports the tread on the tires is extremely low.

Below is an example of what paragraphs may be included in a functional case note. Of course, not all case notes need to be as detailed as an intake case note, for example, a case note about dropping off a bus pass to a client, but if there is anything relevant to document as per the key points mentioned earlier in this document, it's important that it is in fact documented. Even details such as the time and location the bus pass was distributed may play an important role in the future. As has been stated several times, you the client, and current and future outside entities may benefit from your effort to document details in case notes.

Introduction summary paragraph

On "date and time of encounter", Case manager (CM) met with client at "address". The client is "add a summary of demographics (ex. age, gender, etc.)." The client's current living situation is "type of living situation." Client is....

Living situation (or another critical program-specific situation) paragraph

Housing: The client is "describe living situation."

Other items/Paragraphs to consider:

Employment Paragraph

Physical Health Paragraph

Mental Health Paragraph

Substance Abuse Paragraph

Legal Issues Paragraph

Transportation Paragraph

Does your program have a statement that must be included? For example:

But for assistance, client would become homeless. No appropriate alternative has been identified; the client lacks the financial resources to obtain immediate housing or remain in this housing and lacks support networks needed to obtain immediate housing or remain in this housing without this assistance. CM provided Veteran with a resource packet and CM's business card.

Finally, what are the next steps you are taking to ensure the client's needs are being met?

Plan/Next Steps

1. Per the program rules that were explained to the client, the Veteran will keep in contact with CM weekly per program rules
2. Veteran will utilize personal cell phone and transportation to follow up on leads provided in the resource packet provided by CM.
3. CM will prepare and submit referral packet in HMIS.
4. CM will provide a copy of referral packet via email.
5. CM will provide Veteran with housing leads
6. CM will keep in touch with Veteran

***Remember to check "read only" at the bottom of the screen before saving your case note!
Once you've done that, you can move on to the final lesson of our training!***