HMIS Document

# ClientTrack User Guide

## Goal Planning & Case Notes

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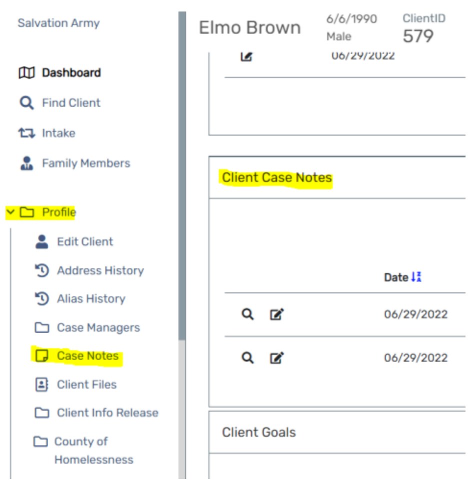
## ClientTrack User Guide – Creating Goals and Case Notes

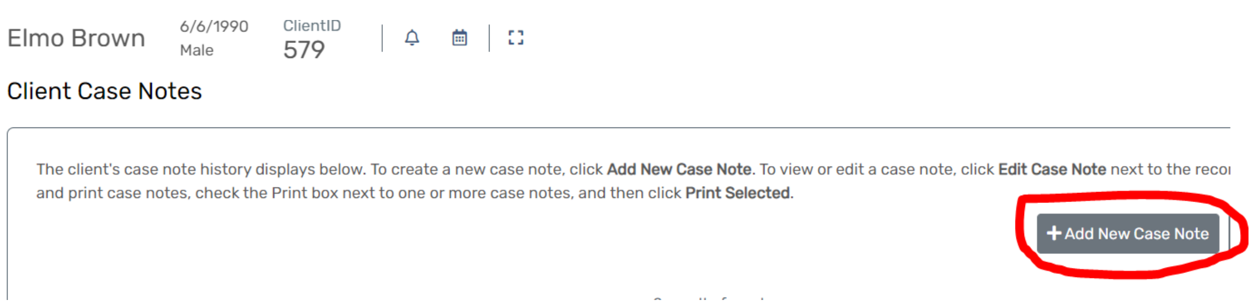
### *Creating a "Stand Alone" Case Note (Not Tied to a Goal)*

This workflow is for users that would like to add a case note without attaching it to a goal. This is particularly useful for users that aren't necessarily providing any long term case management or support, or aren't officially assigned as a case manager (eg. Intake and street outreach staff).

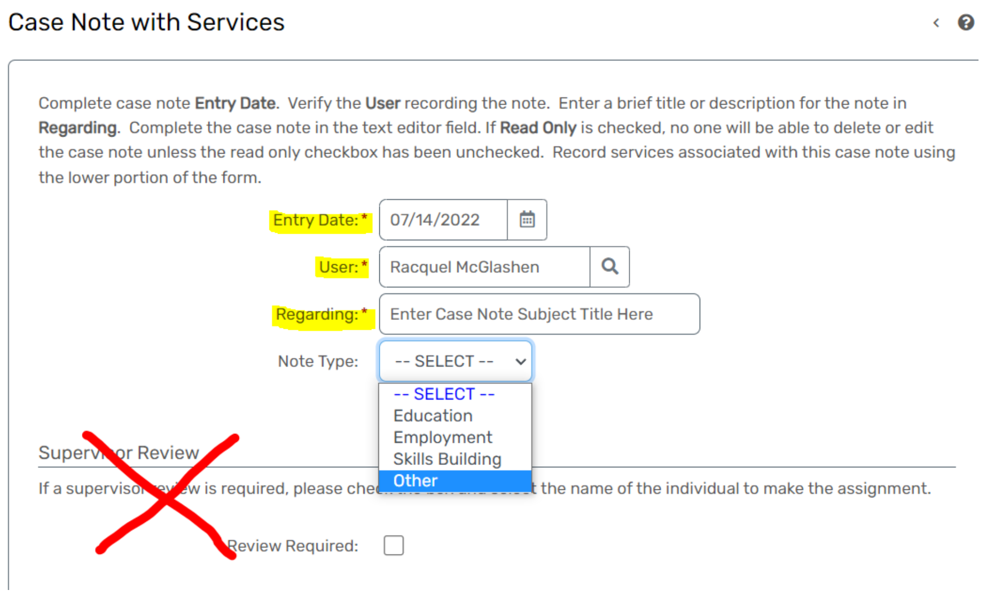
1. Go to the client's record by going to the Client workspace in the blue menu bar, then clicking on "Find Client".
    a. Use first/last name or the HMIS ID field to identify the existing client record in HMIS
2. On the client's dashboard, scroll down to the Client Case Notes section and click on the header title.
    a. You can also get to case notes by expanding the client's profile folder in the menu to the left, and clicking on "Case Notes" in the list.



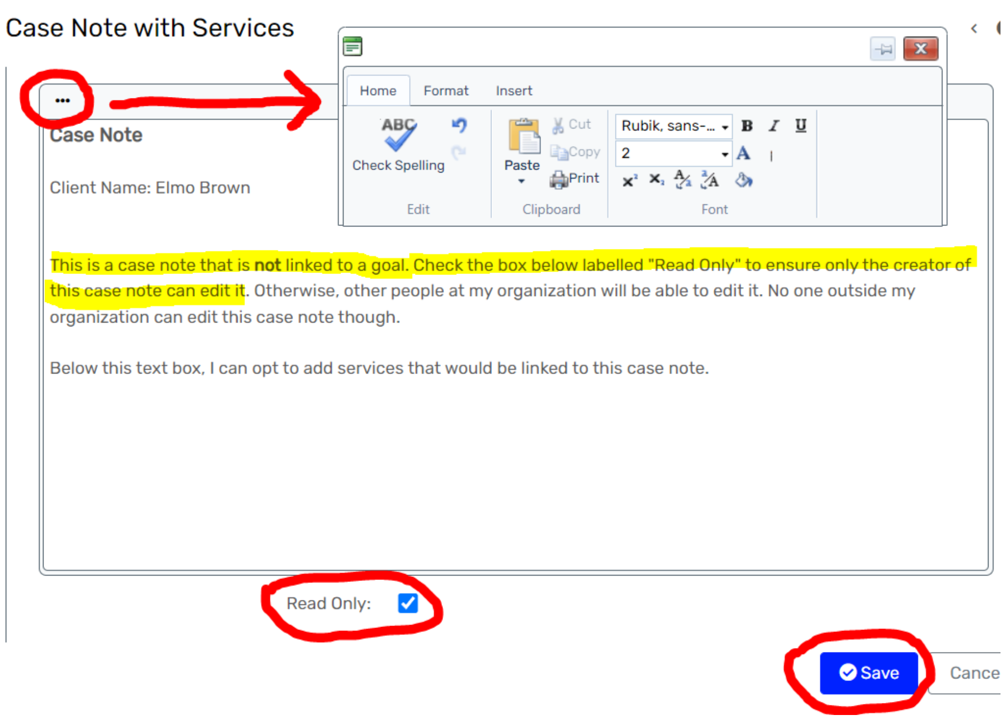

3. Click "Add a New Case Note" at the top right corner of the screen.




4. On this services screen, you can add a case note, and optionally link a service to that case note as well.
    a. At the top of the screen, adjust the case note entry date and user as needed.
    b. Enter a subject title for the field labelled "Regarding". This title will show on the Case Note summary screen.
    c. You can optionally select the Note Type.
    d. Ignore the section labeled "Supervisor Review"

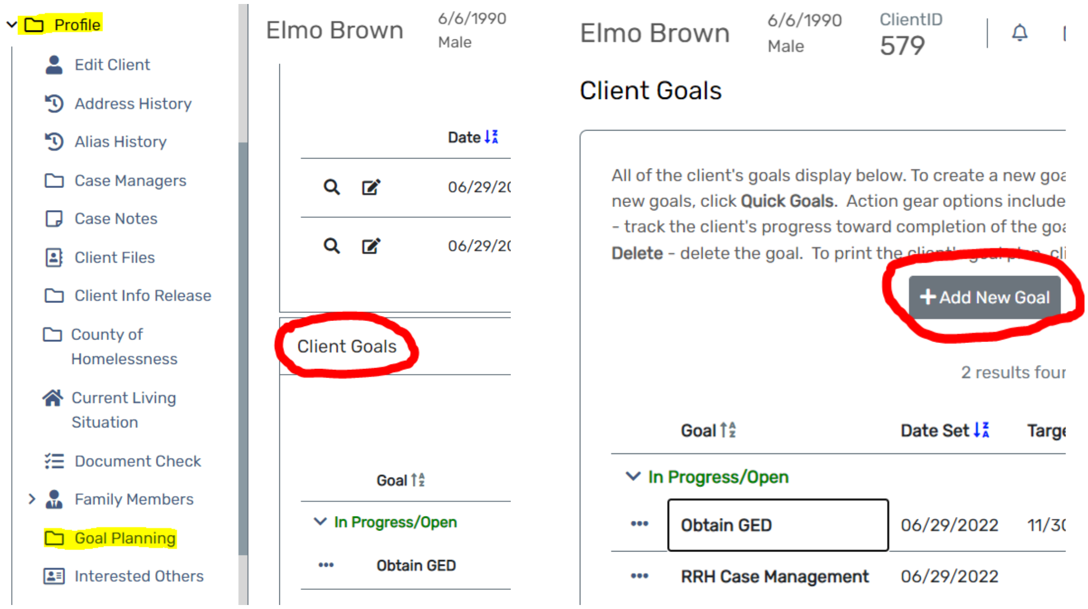



5. In the text box below, enter the case note.
    a. Click the three small dots at the top left corner of the text box to open the formatting settings. Edit the texts' font, size, highlight, bold, italicize, underline, add numbering or bullets, and more.
    b. Below the text box, check the "Read Only" option if you do not want this case note to be editable by anyone other than the creating user. Otherwise, other people at your organization may edit if they choose to. Other users from different organizations may only view the case note whether the "Read only" box is checked or not.
6. If you do not wish to add services at this point, click "Save" at the bottom right corner.

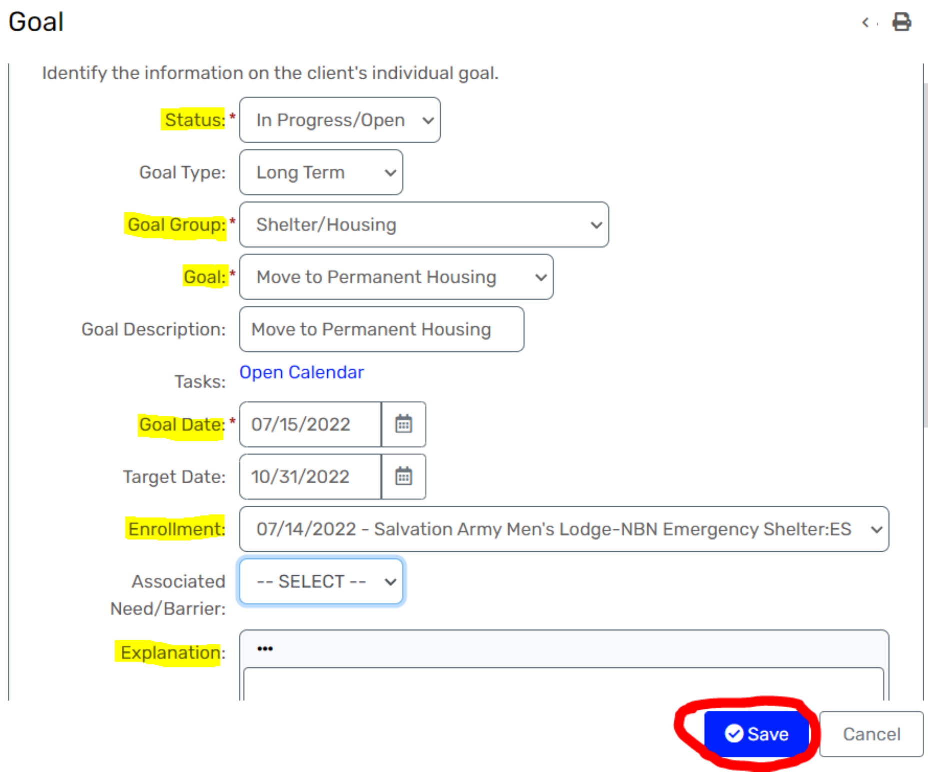


***Creating a Goal and Adding Case Notes***

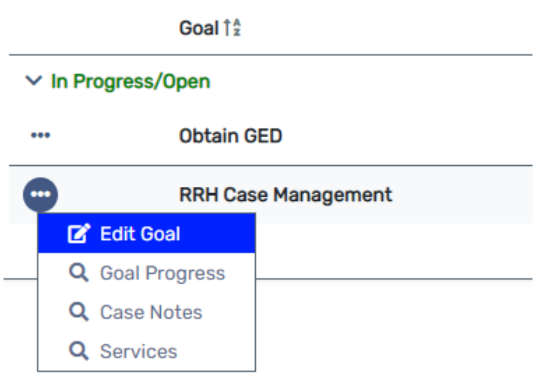
1. On the client dashboard, scroll to the bottom and click the header title, “Client Goals”.
    a. You can also create a goal by expanding the client’s “Profile” folder on the left and clicking on the item labelled, “Goal Planning”.
2. Click on “Add New Goal”.




3. Describe what this goal is by completing at least the required fields on the Goal form:
    a. Status (required) – identify whether this is in progress, identified, or closed.
    b. Goal Type – identify if this is short or long-term
    c. Goal Group (required) – classify the type of goal
    d. Goal (required) – select the type of action being taken under the goal group
    e. Goal Description – a short header/subject title
    f. Tasks – if desired, add a meeting, appointment or task to the client’s calendar.
    g. Goal Date (required) – date the goal is being set.
    h. Target Date – tentative date for completing the goal.
    i. Enrollment (required) – select the associated project the household is in.
    j. Associated Need/Barrier – if desired, associate a need/barrier (disabling condition).
    k. Explanation – this is **not** the actual case note. Use this text box to explain more about the goal and associated case notes.
    l. Click “Save” at the bottom right corner.




4. You will now see the newly created goal and can add case notes to it.
   a. Click on the ellipse icon (three small dots) in front of the goal title. You will have (4) actions that can be associated with this goal.
      i. Edit Goal – use this action to make edits to the initial goal created.
      ii. Goal Progress – use this action to document progress/completion status of the goal.
      iii. Case Notes – use this action to add case notes linked to the goal.
      iv. Services – use this action to add services linked to the goal.




5. Click "Case Notes" and on the following screen, "Add New" to add an associated case note.
   a. On the case note screen, edit the entry date to show when the encounter occurred.
   b. Update the case manager if needed.
   c. Add a subject title for the field labelled "Regarding".

d. Enter the case note into the text box. Format as desired using the three dots at the top left corner of the text box.

e. Check "Read Only" below the text box if you want to be the only one that is able to edit the case note.

   i. Leaving this box unchecked will allow for other users *at your agency"* to edit the case note. All other users outside your agency can only view the case note.

f. Click "Save".