



HMIS Document

ClientTrack User Guide

Goal Planning & Case Notes

Homeless Services Network of Central Florida

142 East Jackson Street

Orlando, FL 32801

Phone: (407) 893-0133

Fax: (407) 893-5299

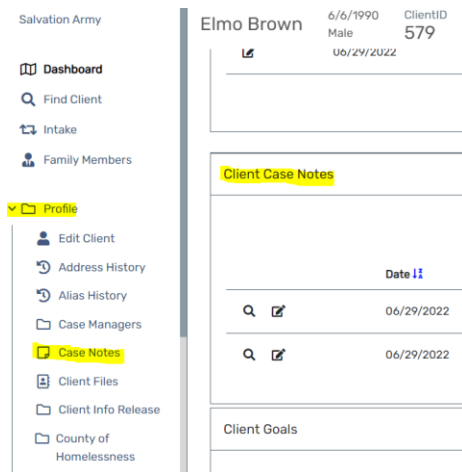
www.hsncl.org

ClientTrack User Guide – Creating Goals and Case Notes

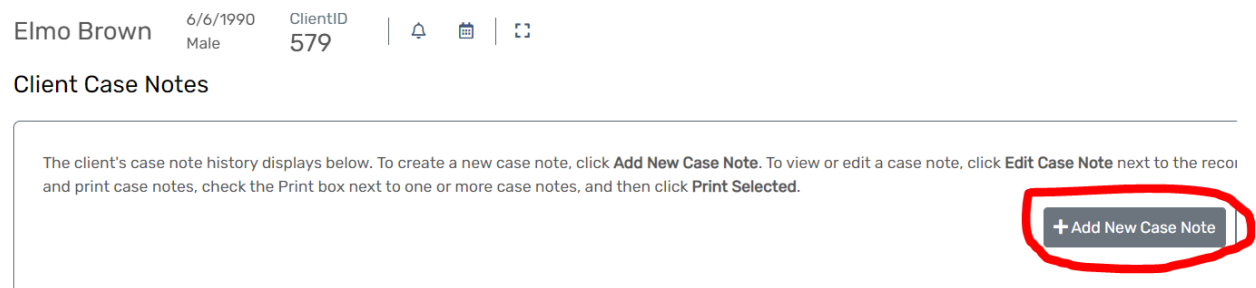
Creating a “Stand Alone” Case Note (Not Tied to a Goal)

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”

Case Note with Services



Complete case note **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text editor field. If **Read Only** is checked, no one will be able to delete or edit the case note unless the read only checkbox has been unchecked. Record services associated with this case note using the lower portion of the form.

Entry Date: * 07/14/2022

User: * Racquel McGlashen

Regarding: * Enter Case Note Subject Title Here

Note Type: -- SELECT --

-- SELECT --

Education

Employment

Skills Building

Other

Supervisor Review

If a supervisor review is required, please check the box below and enter the name of the individual to make the assignment.

Review Required:

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.

Case Note with Services



Case Note

Client Name: Elmo Brown

This is a case note that is **not** linked to a goal. Check the box below labelled "Read Only" to ensure only the creator of this case note can edit it. Otherwise, other people at my organization will be able to edit it. No one outside my organization can edit this case note though.

Below this text box, I can opt to add services that would be linked to this case note.

Read Only:

Save

Cancel

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".

The screenshot shows the client dashboard for Elmo Brown (DOB: 6/6/1990, Male, ClientID: 579). The left sidebar contains a navigation menu with 'Goal Planning' highlighted. The main content area is titled 'Client Goals' and displays a list of goals. A red circle highlights the '+ Add New Goal' button. Below the button, there are two existing goals: 'Obtain GED' and 'RRH Case Management'. The 'Obtain GED' goal is currently in progress, with a date set for 06/29/2022 and a target date of 11/30/2022.

Goal	Date Set	Target
Obtain GED	06/29/2022	11/30/2022
RRH Case Management	06/29/2022	

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.

Goal

Identify the information on the client's individual goal.

Status: * In Progress/Open ▾

Goal Type: Long Term ▾

Goal Group: * Shelter/Housing ▾

Goal: * Move to Permanent Housing ▾

Goal Description: Move to Permanent Housing

Tasks: [Open Calendar](#)


Goal Date: * 07/15/2022 📅

Target Date: 10/31/2022 📅

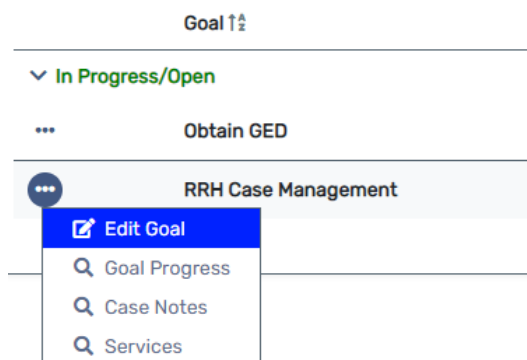
Enrollment: 07/14/2022 - Salvation Army Men's Lodge-NBN Emergency Shelter:ES ▾

Associated Need/Barrier: -- SELECT -- ▾

Explanation: ...

 Save Cancel

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".

Elmo Brown 6/6/1990 ClientID 579 | 🔔 📅 🔄
Male

Case Note < 📄

Entry Date: 07/20/2022 📅

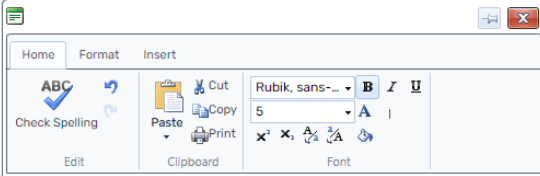
Case Manager: Racquel McGlashen 🔍

Regarding: (SUBJECT/TITLE OF CASE NOTE)

Template: -- SELECT -- ▾

⋮

This is a sample case note linked to a goal.



Read Only:

Save Cancel