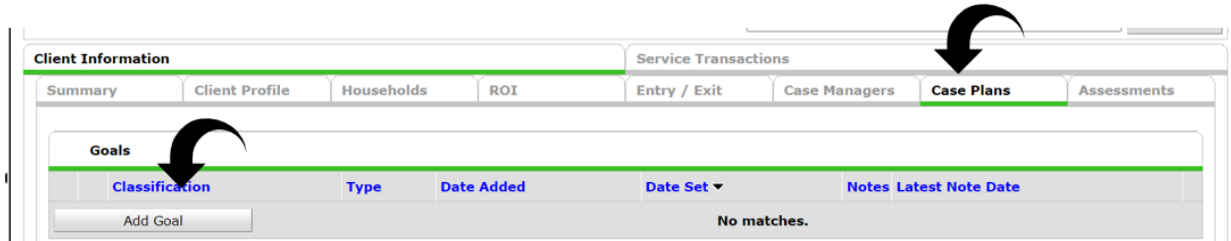


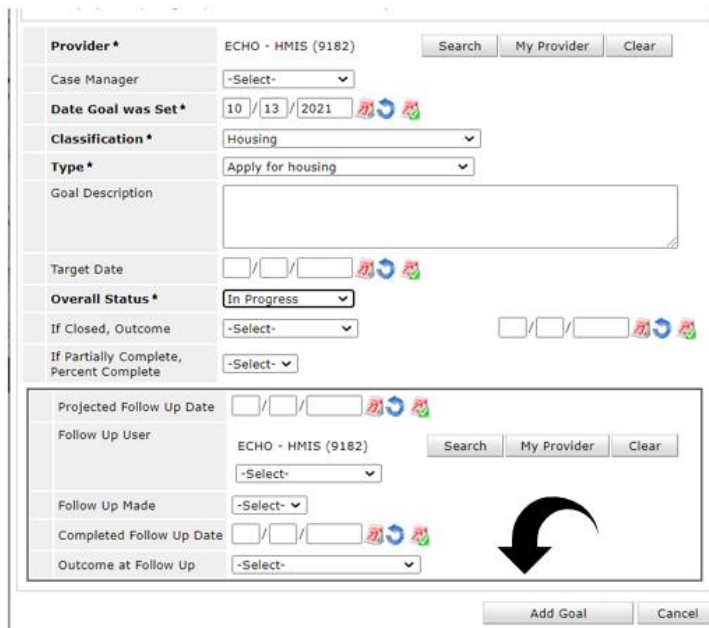
How to Create Case Notes in HMIS

Purpose: This guide outlines how to create case notes within HMIS. To be able to create the initial case note, you'll first need to create a goal. Without doing this there won't be an option to create a case note. Once a goal is created, multiple case notes can be added to the same goal.

1. Find the client's record you are wanting to enter a case note for, Click Case Plans, Add Goal.

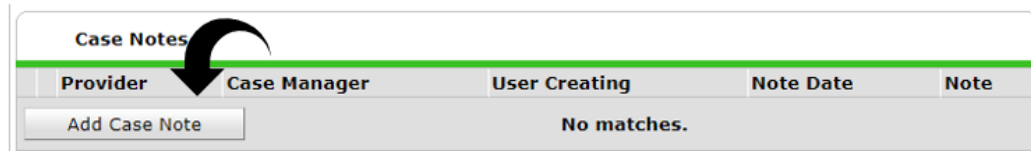


2. If you are solely using the goal function of HMIS to create case notes, you only need to fill out the asterisked portions of the pop-up menu. The other sections are optional to complete. Then click Add Goal.



Provider * ECHO - HMIS (9182) Search My Provider Clear
 Case Manager -Select-
Date Goal was Set * 10 / 13 / 2021
Classification * Housing
Type * Apply for housing
 Goal Description
 Target Date
Overall Status * In Progress
 If Closed, Outcome -Select-
 If Partially Complete, Percent Complete -Select-
 Projected Follow Up Date
 Follow Up User ECHO - HMIS (9182) Search My Provider Clear
 Follow Up Made -Select-
 Completed Follow Up Date
 Outcome at Follow Up -Select-
 Add Goal Cancel

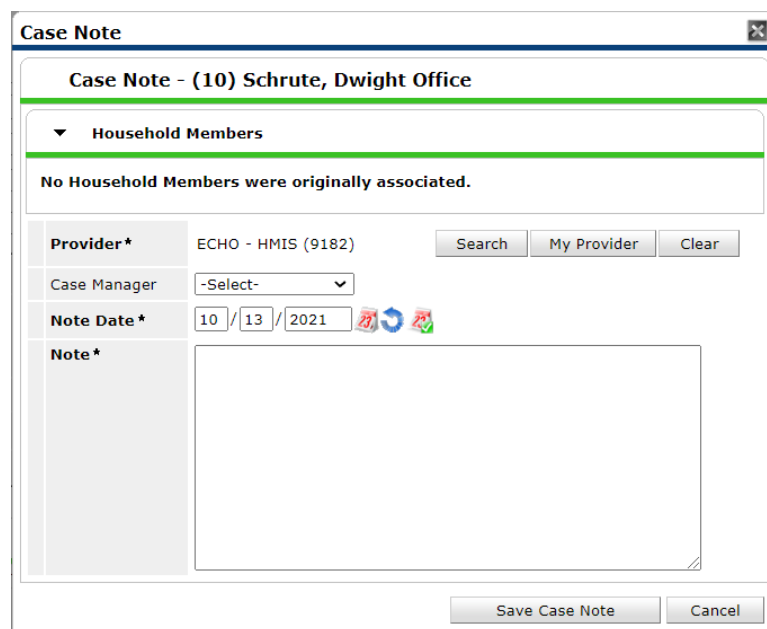
- Once you select Add Goal, you'll then see the option to create case notes.



Provider	Case Manager	User Creating	Note Date	Note
No matches.				

Add Case Note

- You can then enter your case note and click Save Case Note.



Case Note - (10) Schrute, Dwight Office

Household Members

No Household Members were originally associated.

Provider* ECHO - HMIS (9182) Search My Provider Clear

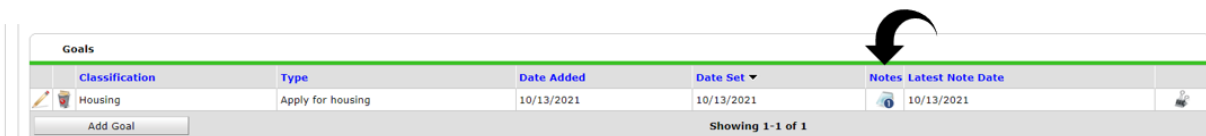
Case Manager -Select-

Note Date* 10 / 13 / 2021

Note*

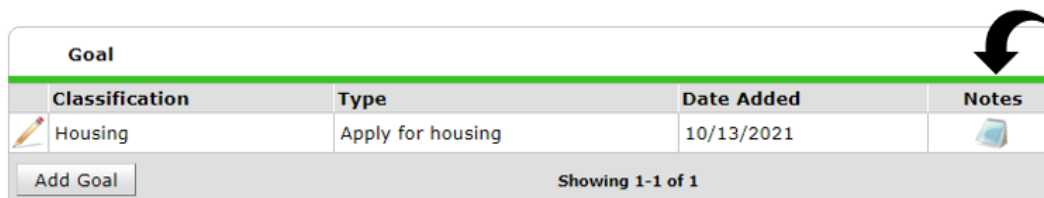
Save Case Note Cancel

- Once you create the initial case note, you'll be able to keep adding case notes to the goal record. You can do this by clicking the Notes icon on the goal record in the case plans tab. Or by clicking on the Notes icon on the goal record from the client's summary tab.



Classification	Type	Date Added	Date Set	Notes Latest Note Date
Housing	Apply for housing	10/13/2021	10/13/2021	10/13/2021

Add Goal Showing 1-1 of 1



Classification	Type	Date Added	Notes
Housing	Apply for housing	10/13/2021	

Add Goal Showing 1-1 of 1