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.

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

Case Notes

Provider	Case Manager	User Creating	Note Date	Note
Add Case Note		No matches.		

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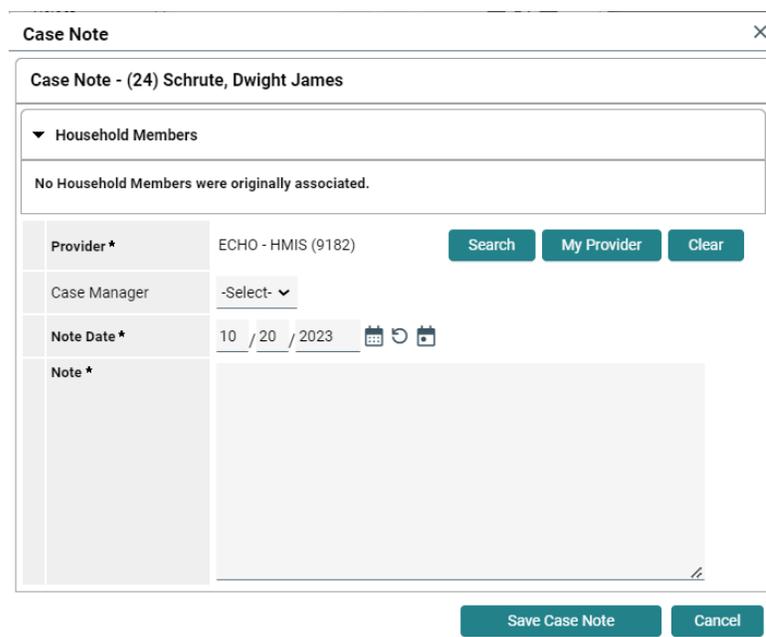
Case Note ✕

Case Note - (24) Schrute, Dwight James

▼ Household Members

No Household Members were originally associated.

Provider *	ECHO - HMIS (9182)	Search	My Provider	Clear
Case Manager	-Select- ⌄			
Note Date *	10 / 20 / 2023			
Note *				

Save Case Note   Cancel

5. 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.

Goals
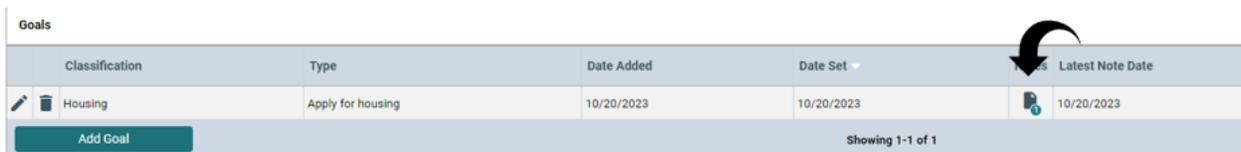
	Classification	Type	Date Added	Date Set		Latest Note Date
✏ 🗑	Housing	Apply for housing	10/20/2023	10/20/2023		10/20/2023
Add Goal					Showing 1-1 of 1	