



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.

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments
Goals							
Classification	Type	Date Added	Date Set	Notes	Latest Note Date		
Add Goal		No matches.					

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 / 20 / 2023	  
Classification *	Housing	
Type *	Apply for housing	
Goal Description	<div style="border: 1px solid #ccc; height: 30px;"></div>	
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
	-Select-	
Follow Up Made	-Select-	
Completed Follow Up Date	/ /	  
Outcome at Follow Up	-Select-	

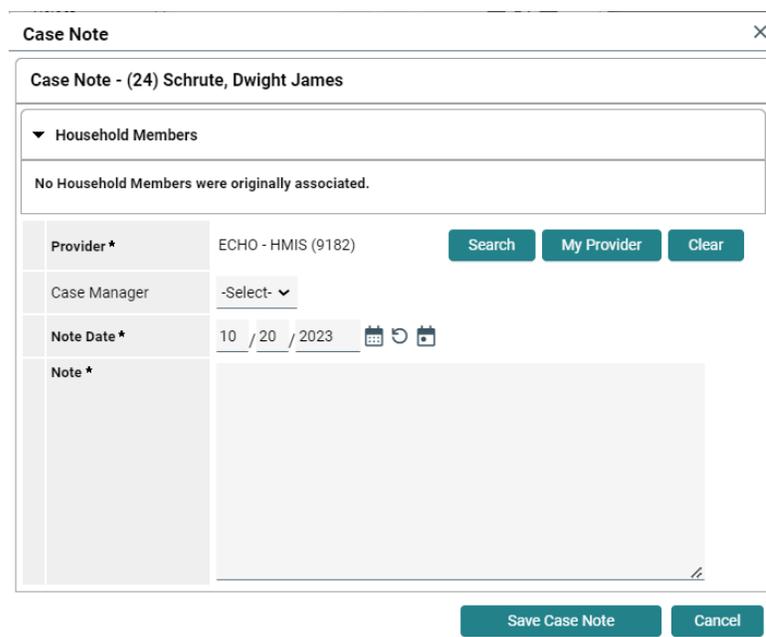
[Add Goal](#) [Cancel](#)

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



Provider	Case Manager	User Creating	Note Date	Note
<input type="button" value="Add Case Note"/> No matches.				

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



Case Note ✕

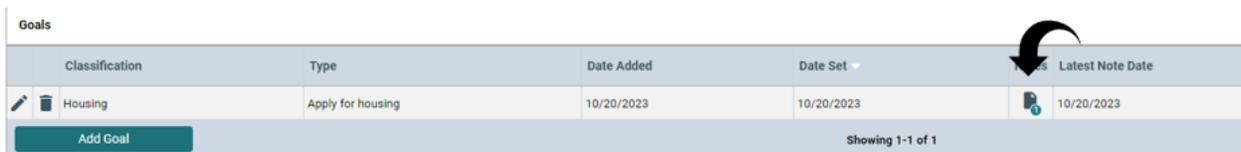
Case Note - (24) Schrute, Dwight James

▼ Household Members

No Household Members were originally associated.

Provider *	ECHO - HMIS (9182)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Case Manager	-Select- ▼			
Note Date *	10 / 20 / 2023	<input type="button" value="Calendar"/>	<input type="button" value="Refresh"/>	<input type="button" value="Calendar"/>
Note *				

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.



Classification	Type	Date Added	Date Set	Latest Note Date
	Apply for housing	10/20/2023	10/20/2023	10/20/2023

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