Durham CE Guide: Notes in HMIS

This guide will map the different ways to record notes in the HMIS and how the content is shared, or not.

Front Door CE Notes Content in HMIS

Notes on clients can be vital to case management, collaboration within your agency and with other community partners, and effective relationship building.

Format

No matter which notes location you are using, make the format consistent so colleagues can use the valuable information collected in the future.

- New notes will go above the previous notes
- The first row of the note will be the Date and Time
- The second row will be the note details and your initials

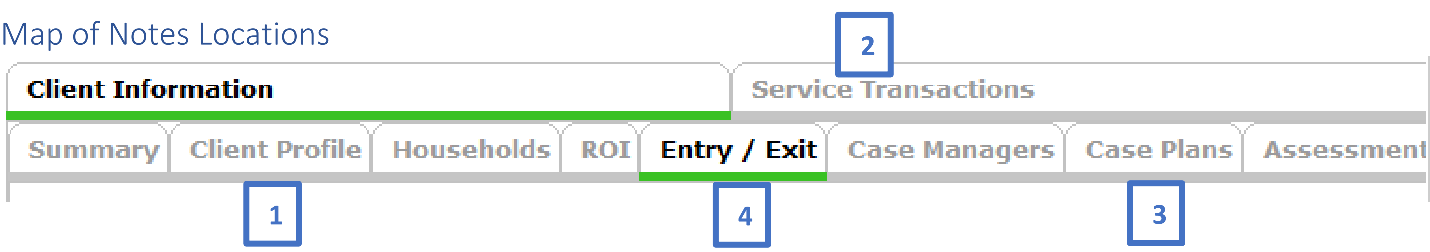
01.01.2020 12:00 pm This is an example of a note. AZ

Content

What should you include in a note? If you are no longer working with the client or out of the office, what would your colleague need to continue supporting the client? Use the following categories as a guide.

- Notes on the client/household
  - Potential natural supports
  - Goals and motivations or challenges and obstacles
  - Recommending intimate partner domestic violence and abuse assessment before shared room referral
  - Client schedule/transportation
  - If unsheltered, sleeping location
- Notes on the case worker
  - Action steps taken
  - Attempts to resolve a crisis, connect to services, pursue a goal
- Status of the housing crisis

Map of Notes Locations



#1 Add Case Notes to *Client Profile*

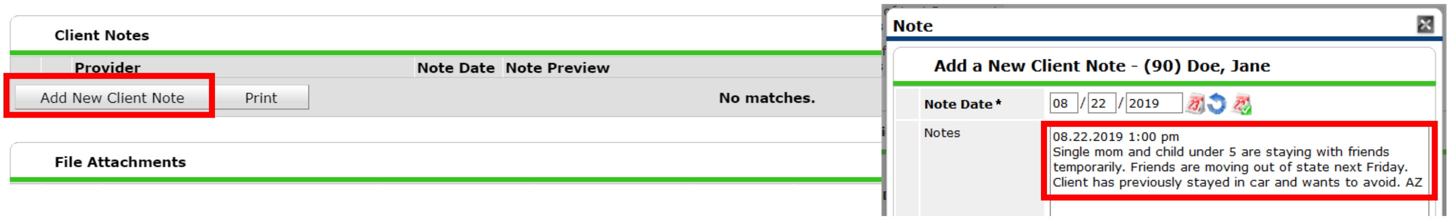
One way to record notes is available on the *Client Profile* tab. This is the location for Diversion staff to record Diversion conversation notes, and for shelter or outreach staff to document notes that may be helpful for other agencies to see.

Who can see these notes?

HMIS users in your agency, users in the Front Door Entry Point, Shelter, and Outreach Visibility Groups, CoC Leads, and HMIS administrators can see these notes.

Where to find these notes?

1. On the *Client* Profile tab, scroll to the bottom and select *Add New Client Note*.



#2 Add Case Notes to *Services and Referrals*

Notes are especially important to successful referrals. If a client is not able to receive a referral or service, these notes can specify the circumstances. For Street Outreach or Emergency Shelter services each agency needs to know:

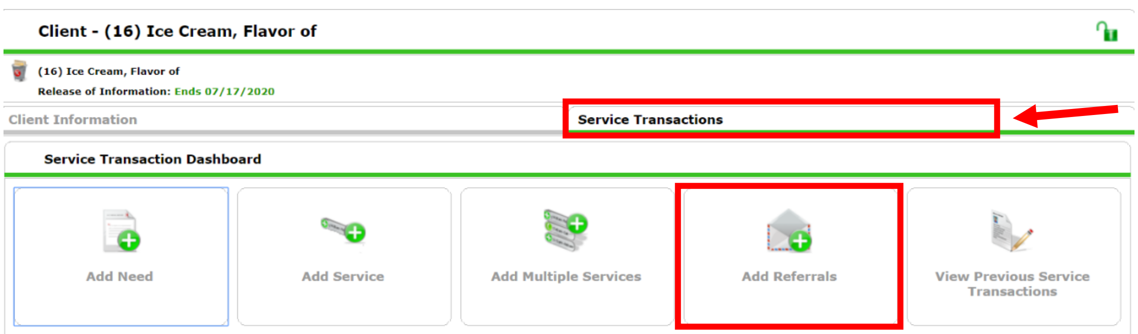
Confirmed intake/scheduling	Bed or Room reservations	Any other information needed for successful services.
The ages of any children	Total number in household (if more than 1)	

Who can see these notes?

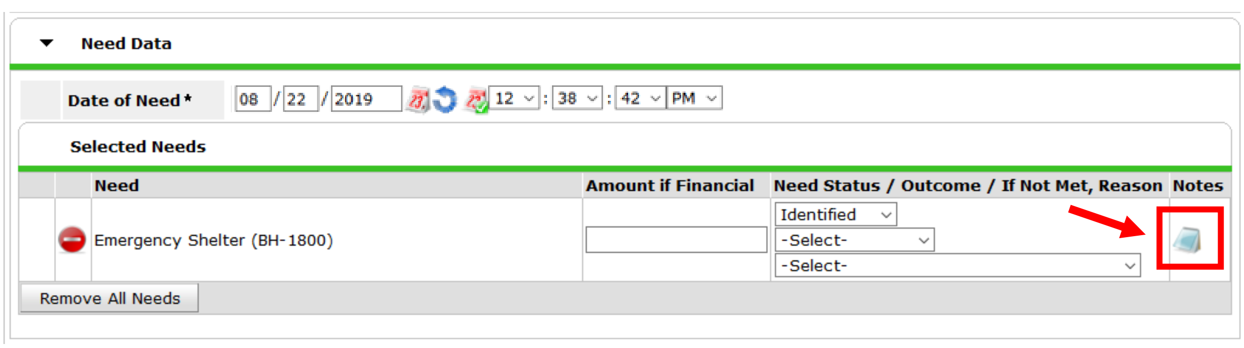
HMIS users in your agency, users in the Front Door Entry Point, Shelter, and Outreach Visibility Groups, CoC Leads, and HMIS administrators can see these notes. If a user can send or receive a referral in HMIS (and the other agency also see that referral), then this note will be visible.

Where to find these notes for a new Referral or Service

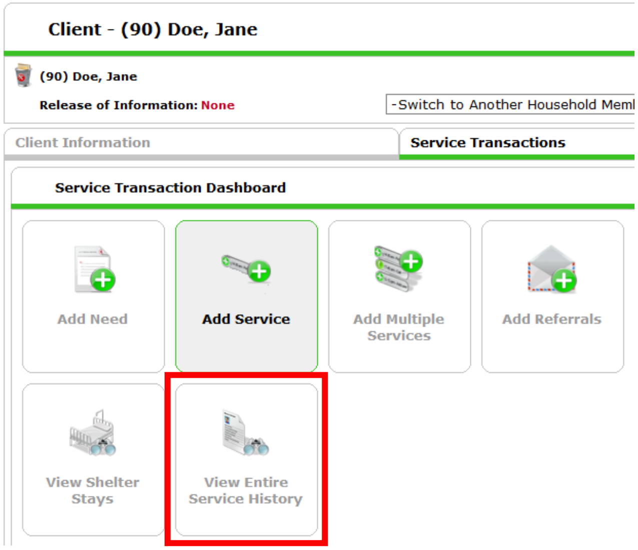
1. On the *Service Transactions* tab, click *Add Referrals.*



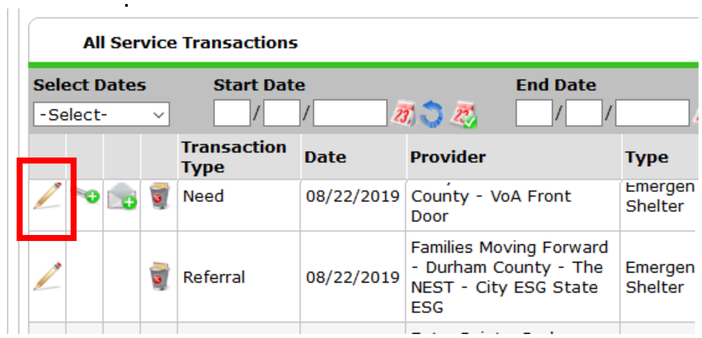
   a. Scroll to the very bottom *Need Details* section to record notes. (Complete the referral details as needed)



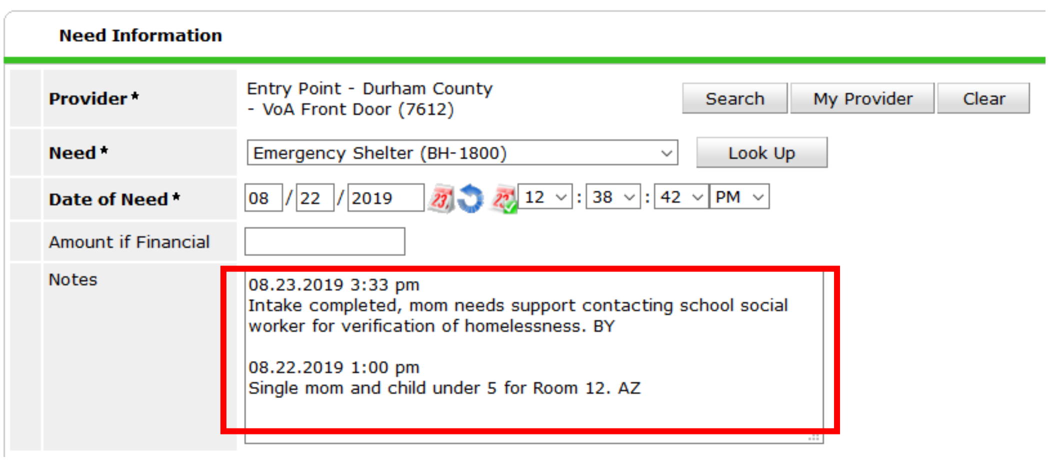
Where to find these notes for an existing Referral or Service Transaction



1. On the *Service Transactions* tab, click *View Entire Service History*
2. Find the *Need* connected to the referral that you want to add a note and click on the Pencil



a. Notes can be updated under the basic *Need Information*



#3 Add Case Notes to *Goals*

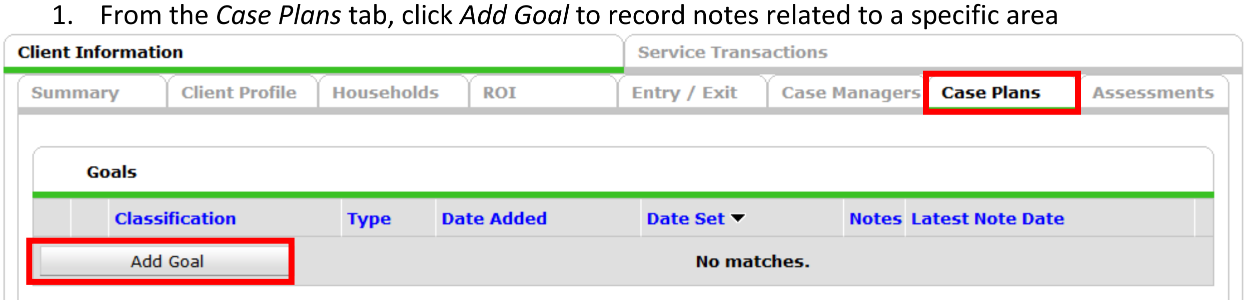
If case management includes recording case plans and progress towards client goals in HMIS, case notes can be tracked. This can also be helpful for coordinating care and services within your agency.

Who can see these notes?

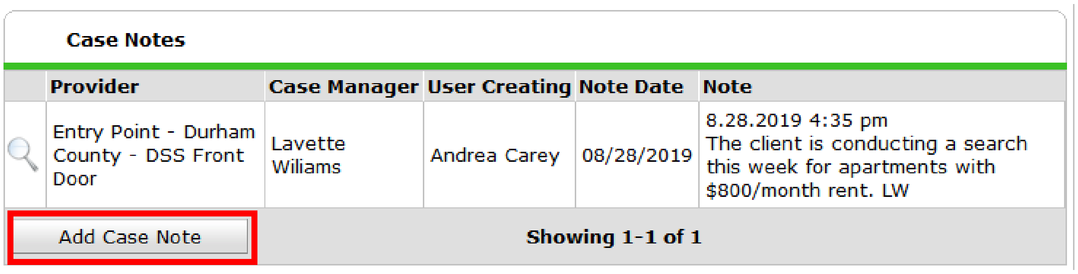
Only HMIS users in your agency, CoC Leads, and HMIS administrators can see these notes.

Where to find these notes

1. From the *Case Plans* tab, click *Add Goal* to record notes related to a specific area



2. Once the goal is saved, a new area will appear where case notes can be added. Click *Add Case Notes* to save information about the client's progress.



#4 Add Case Notes to *Exits*

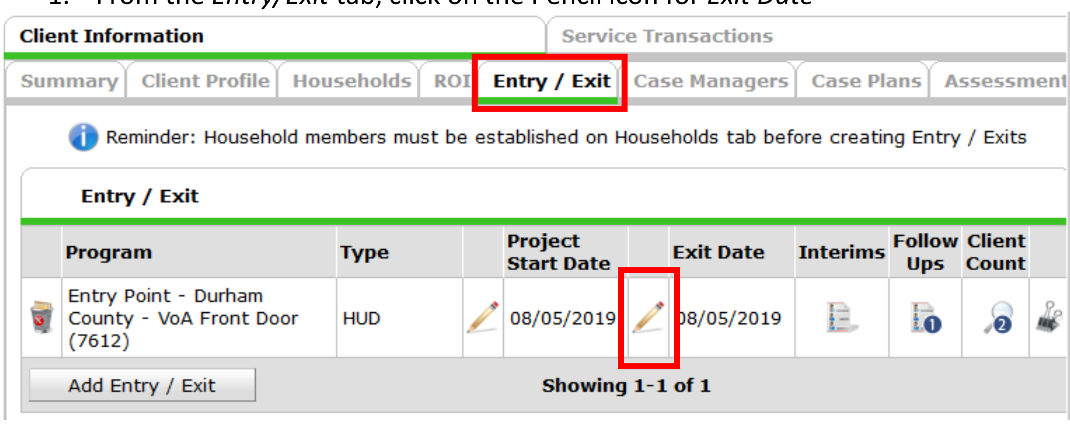
When a client leaves the Entry Point project, shelter projects, or outreach projects, details about the exit can be saved near the *Reason for Leaving* and *Exit Destination*.

Who can see these notes?

HMIS users in your agency, users in the Front Door Entry Point, Shelter, and Outreach Visibility Groups, CoC Leads, and HMIS administrators can see these notes. If a user can see client responses for individual questions on the Intake, Interim, or Exit Assessments, they can also see this note on the client's *Exit*.

Where to find these notes

1. From the *Entry/Exit* tab, click on the Pencil icon for *Exit Date*



2. Beneath Exit Destination, use the Notes box for details about the client's exit