



USER BULLETIN: Creating Case Notes and Client Goals

4-March-14

One of the goals of KnoxHMIS is to coordinate care for our clients by developing and implementing case plans. Following are the appropriate steps on how to add case notes for your clients.

PART 1: Adding Case Notes

Step 1: Access client's profile

Your client should already be entered into KnoxHMIS before completing this workflow. If you have not yet created your client please visit the following link for information on how to do so before proceeding:

<https://knoxhmis.sworps.tennessee.edu/wp-content/uploads/2013/09/OrderofEntry.pdf>

From the client's profile, click the "Case Plans" tab as indicated by the red arrow in Figure 1.

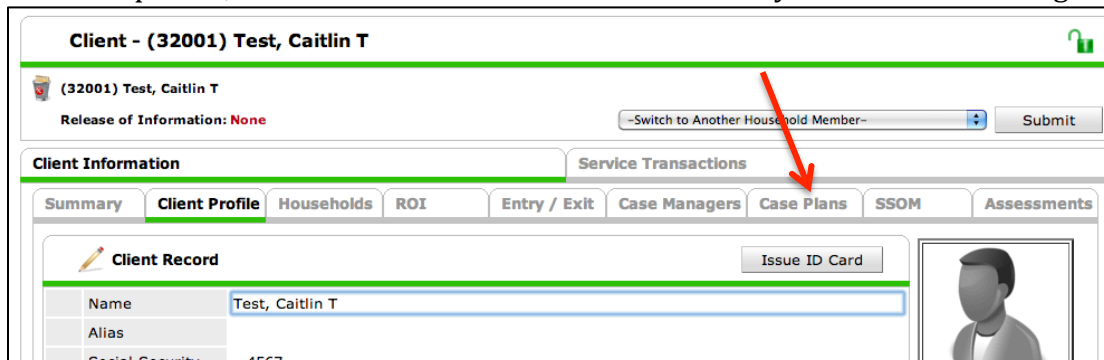


Figure 1

Step 2: Add the client's Case Notes

You will then be taken to the Case Plans tab. To add a new case note, please click "Add Goal" as indicated by the red arrow in Figure 2.

Client - (32001) Test, Caitlin T

(32001) Test, Caitlin T
Release of Information: **None** -Switch to Another Household Member- Submit

Client Information **Service Transactions**

Summary Client Profile Households ROI Entry / Exit Case Managers **Case Plans** SSOM Assessments

Goals

Classification	Type	Date Added	Date Set	Notes	Latest Note Date
No matches.					

Add Goal

Case Plans File Attachments

Date Added	Name	Description	Type	Provider
No matches.				

Add New File Attachment

Figure 2

You will then be taken to the "Goal" pop-up as shown in Figure 3. Please select the appropriate household by checking the box next to the household ID (blue arrow). For "Classification" select "Case Notes," and for "Type" select "Case Notes" as indicated by the red arrow in Figure 3. For "Overall Status," select "In Progress." Then click "Add Goal" as indicated by the green arrow.

Goal

Goal - (32001) Test, Caitlin T

Household Members

To include Household members for this Goal, click the box beside each name. Only members from the SAME Household may be selected.

(14470) Female Single Parent

(32001) Test, Caitlin T

(25131) McTest, Quizz

Provider* University of Tennessee at Knoxville (1) Search My Provider Clear

Case Manager -Select-

Date Goal was Set* 02 / 14 / 2014

Classification* Case Notes

Type* Case Notes

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 University of Tennessee at Knoxville (1) Search My Provider Clear

Follow Up Made -Select-

Completed Follow Up Date

Outcome at Follow Up -Select-

Add Goal Cancel

Figure 3

Once you have clicked “Add Goal,” a place to add case notes will be available in the “goal” pop-up as shown in Figure 4. You can then click “Add Case Note” as indicated by the red arrow.

The screenshot shows a 'Goal' pop-up window with three main sections:

- Case Notes:** A table with columns: Provider, Case Manager, User Creating, Note Date, Note. Below the table is an 'Add Case Note' button. A red arrow points to this button. The text 'No matches.' is displayed below the table.
- Action Steps Planned:** A table with columns: Action Step, Target Date, Status, Outcome. Below the table is an 'Add Action Step' button. The text 'No matches.' is displayed below the table.
- Service Items for this Goal:** A table with columns: Date Set, Created By, Need Type, Need Status, Outcome of Need. Below the table are 'Add Service' and 'Add Multiple Services' buttons. The text 'No matches.' is displayed below the table.

At the bottom of the window are buttons for 'Print', 'Save Goal', 'Save & Exit', and 'Exit'.

Figure 4

You will then be taken to the Case Notes popup (Figure 5). Here you can add the case note for your client(s). When you are finished, click “Save Case Note” as indicated by the red arrow.

The screenshot shows a 'Case Notes' popup window titled 'Case Note - (32001) Test, Caitlin T'. It contains the following fields and options:

- Household Members:** A section with a dropdown arrow and a message: 'To include Household members for this Case Note, click the box beside each name. Only members from the SAME Household may be selected.' Below this are three checked items: '(14470) Female Single Parent', '(32001) Test, Caitlin T', and '(25131) McTest, Quizz'.
- Provider *:** University of Tennessee at Knoxville (1). Includes 'Search', 'My Provider', and 'Clear' buttons.
- Case Manager:** A dropdown menu currently showing '-Select-'.
- Note Date *:** 02 / 14 / 2014. Includes calendar and refresh icons.
- Note *:** A text area containing the text 'Example case notes....'
- Buttons:** 'Save Case Note' and 'Cancel' buttons at the bottom right. A red arrow points to the 'Save Case Note' button.

Figure 5

The case note you just completed will show up under the “Case Notes” heading in your client’s Goal popup. You can continue adding case notes or you can scroll to the bottom and click “Save & Exit” as indicated by the red arrow in Figure 6.

Case Notes					
	Provider	Case Manager	User Creating	Note Date	Note
	University of Tennessee at Knoxville		Caitlin Ensley	02/14/2014	Example case notes....

Add Case Note Showing 1-1 of 1

Action Steps Planned

Action Step	Target Date	Status	Outcome
No matches.			

Add Action Step

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
No matches.				

Add Service Add Multiple Services

Print Save Goal Save & Exit Exit

Figure 6

Step 3: Adding further case notes

In the future you may wish to add further case notes. This is easily done by accessing the “Case Plans” tab as shown previously, and by then clicking the notebook icon, as indicated by the red arrow in Figure 7.

Client Information Service Transactions

Summary Client Profile Households ROI Entry / Exit Case Managers **Case Plans** SSOM Assessments

Goals

	Classification	Type	Date Added	Date Set	Notes	Latest Note Date
	Case Notes	Case Notes	02/14/2014	02/14/2014		02/14/2014

Add Goal Showing 1-1 of 1

Case Plans File Attachments

Date Added	Name	Description	Type	Provider
No matches.				

Add New File Attachment

Print Case Plan Exit

Figure 7

You can then click “Add Case Note” to add additional case notes as indicated by the red arrow in Figure 8.

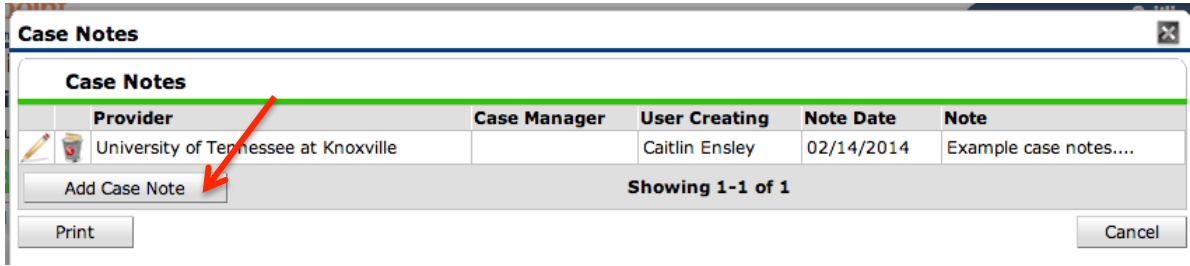


Figure 8

Add the additional case note and then click “Save Case Note” as indicated by the red arrow in Figure 9.

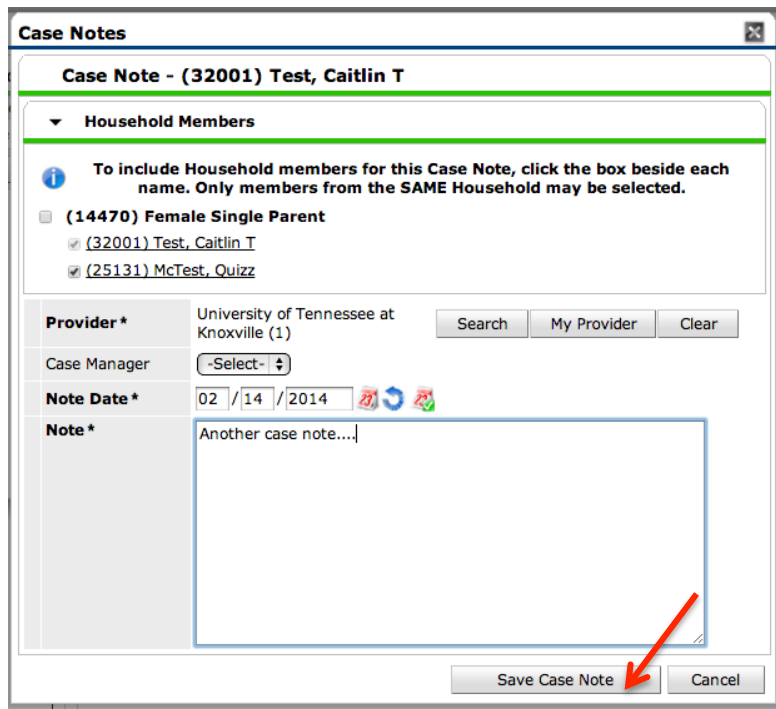


Figure 9

When you have finished entering all client case notes, click “Cancel” to be taken back to the client’s profile.

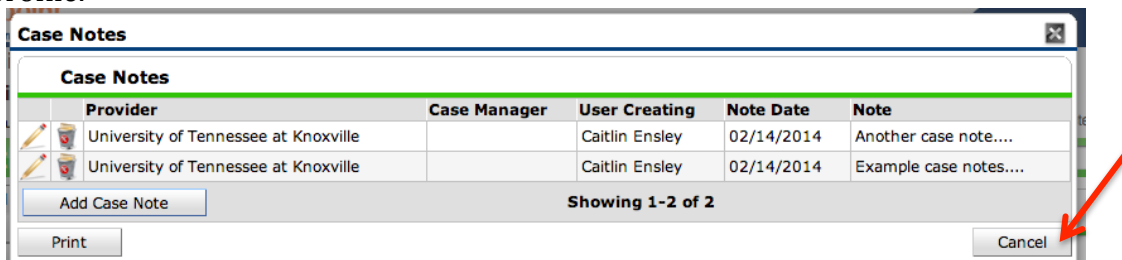
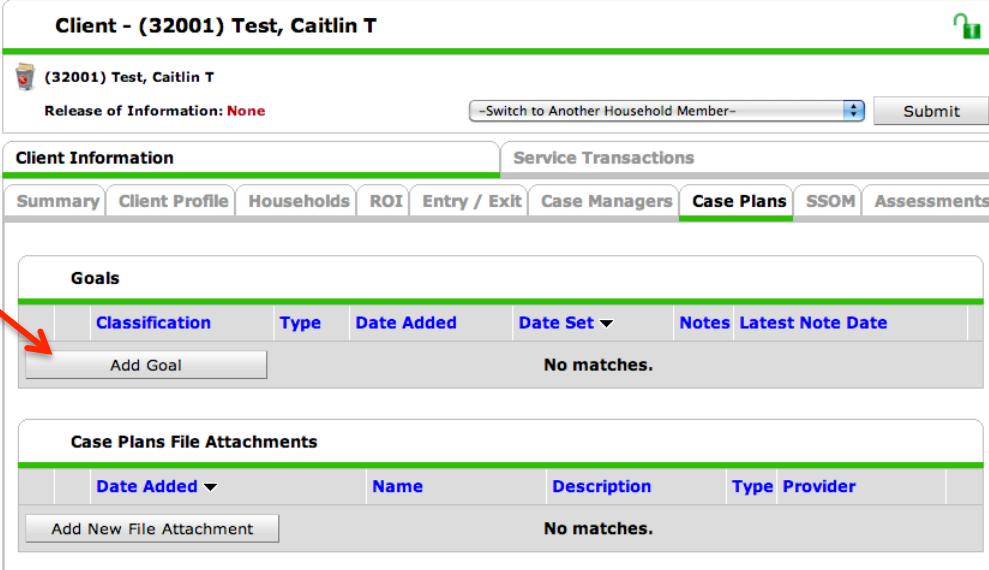


Figure 10

Part 2: Adding Client Goals

Step 1: Adding Client Goals

Please go to the “Case Plans” tab on the client profile. To add a client goal, please click “Add Goal” as indicated by the red arrow in Figure 11.



The screenshot shows the client profile for Caitlin T. (32001). The 'Case Plans' tab is selected. The 'Goals' section is currently empty, displaying a table with columns for Classification, Type, Date Added, Date Set, Notes, and Latest Note Date. A red arrow points to the 'Add Goal' button in the bottom left of this section. Below the Goals section is the 'Case Plans File Attachments' section, which is also empty and has an 'Add New File Attachment' button.

Figure 11

You will then be taken to the “Goal” pop-up as shown in Figure 12. Please select the appropriate household by checking the box next to the household ID (blue arrow). For “Classification” select “Case Notes,” and for “Type” select “Case Notes” as indicated by the red arrow in Figure 12. You can also add a goal description.

For “Overall Status,” select “In Progress.” Select the appropriate follow-up date and follow-up user. In this instance, the follow-up date selected was the date of the client’s court date.

Then click “Add Goal” as indicated by the green arrow.

Household Members

To include Household members for this Goal, click the box beside each name. Only members from the SAME Household may be selected.

(14470) Female Single Parent

(32001) Test, Caitlin T

(25131) McTest, Quizz

Provider * University of Tennessee at Knoxville (1)

Case Manager -Select-

Date Goal was Set * 03 / 04 / 2014

Classification * Case Notes

Type * Case Notes

Goal Description Client has a court date on 4/14/2014

Target Date / /

Overall Status * In Progress

If Closed, Outcome -Select- / /

If Partially Complete, Percent Complete -Select-

Projected Follow Up Date 04 / 14 / 2014

Follow Up User University of Tennessee at Knoxville (1)

Caitlin Ensley

Follow Up Made -Select-

Completed Follow Up Date / /

Outcome at Follow Up -Select-

Figure 12

Once you have clicked “Add Goal,” you can add case notes, add action steps, or add a service linked to this goal. When you are finished, click “Save & Exit” as indicated by the red arrow in Figure 13.

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

Action Steps Planned			
Action Step	Target Date	Status	Outcome
Add Action Step			
No matches.			

Service Items for this Goal				
Date Set	Created By	Need Type	Need Status	Outcome of Need
Add Service				
Add Multiple Services				
No matches.				

Print	Save Goal	Save & Exit	Exit
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Figure 13

You will then be taken to the Casenotes tab, where you can see the goal you just added (Figure 14).

Goals							
	Classification	Type	Date Added	Date Set	Notes	Latest Note Date	
	Case Notes	Case Notes	03/04/2014	03/04/2014			
	Case Notes	Case Notes	02/14/2014	02/14/2014		02/14/2014	
Add Goal		Showing 1-2 of 2					

Figure 14

Going back to the home dashboard, you will see the goal you just created in your follow up list as shown in Figure 15.

Follow Up List (1)			
Client ID	Type	Date	Time Remaining
32001	Goal	04/14/2014	19 Days

Figure 15

Step 2: Completing and following up with client goals

To complete a client goal, click on "goal" as indicated by the red arrow in Figure 16.

Follow Up List (1)			
Client ID	Type	Date	Time Remaining
32001	Goal	04/14/2014	19 Days

Figure 16

You will be taken to the goal screen as shown in Figure 17. Change the overall status to “Closed.” Select the appropriate choice from “If Closed, Outcome” – Abandoned, Achieved, Goal Revised, or Partially Achieved. If “partially achieved,” select the appropriate percentage from “If partially complete, percent complete.”

Then enter the day the goal was completed. In this example, the day the client goal was completed was 4/14/2014.

If you chose to follow up with the client and your follow-up has been completed, select “yes” for “follow-up made,” the correct follow up date, and the appropriate answer for “outcome at follow up.”

Goal

Goal - (32001) Test, Caitlin T

▼ **Household Members**

No Household Members were originally associated. Include Additional Household Members

Provider *	University of Tennessee at Knoxville (1)	Search My Provider Clear
Case Manager	-Select-	
Date Goal was Set *	03 / 04 / 2014	🔄 🔄 🔄
Classification *	Case Notes	
Type *	Case Notes	
Goal Description	Client has a court date on 4/14/2014	
Target Date		🔄 🔄 🔄
Overall Status *	Closed	
If Closed, Outcome	-Select-	04 / 14 / 2014 🔄 🔄 🔄
If Partially Complete, Percent Complete	-Select-	

Projected Follow Up Date	04 / 14 / 2014	🔄 🔄 🔄
Follow Up User	University of Tennessee at Knoxville (1)	Search My Provider Clear
	Caitlin Ensley	
Follow Up Made	Yes	
Completed Follow Up Date	04 / 14 / 2014	🔄 🔄 🔄
Outcome at Follow Up	Was Failed, Now Achieved	

Figure 17

When you are finished entering all information, click “Save & Exit” at the bottom of the screen.

You are now finished adding client case notes and goals.
Please contact hmissupport@utk.edu if you have any questions.