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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.

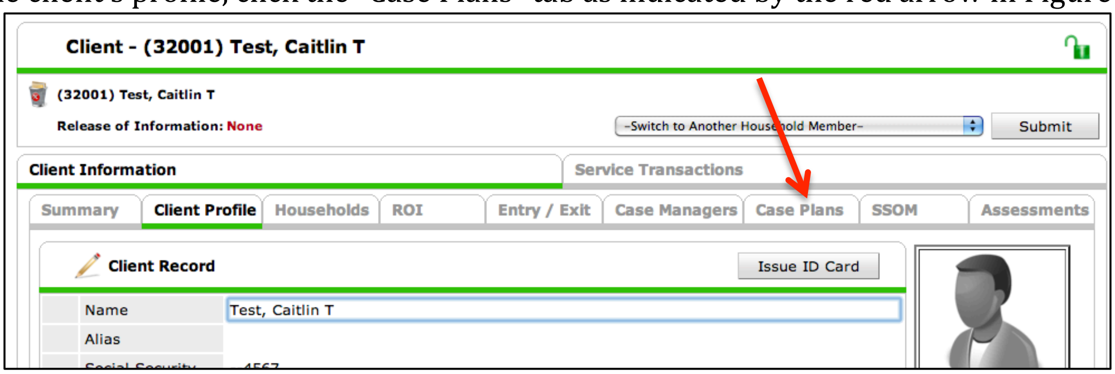

Figure 1

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.

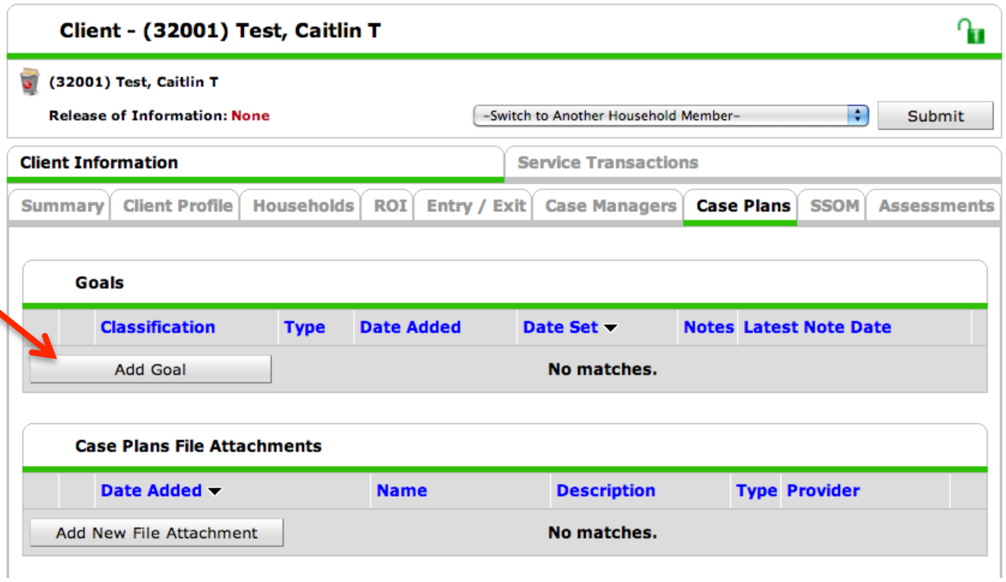

Figure 2

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.

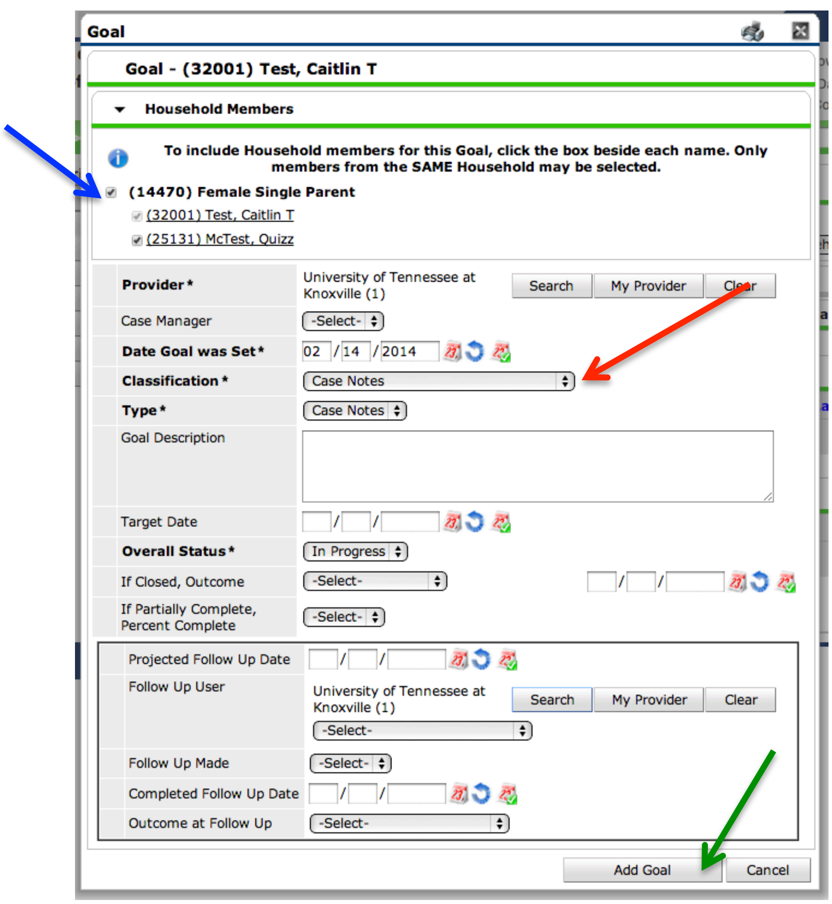

Figure 3

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.

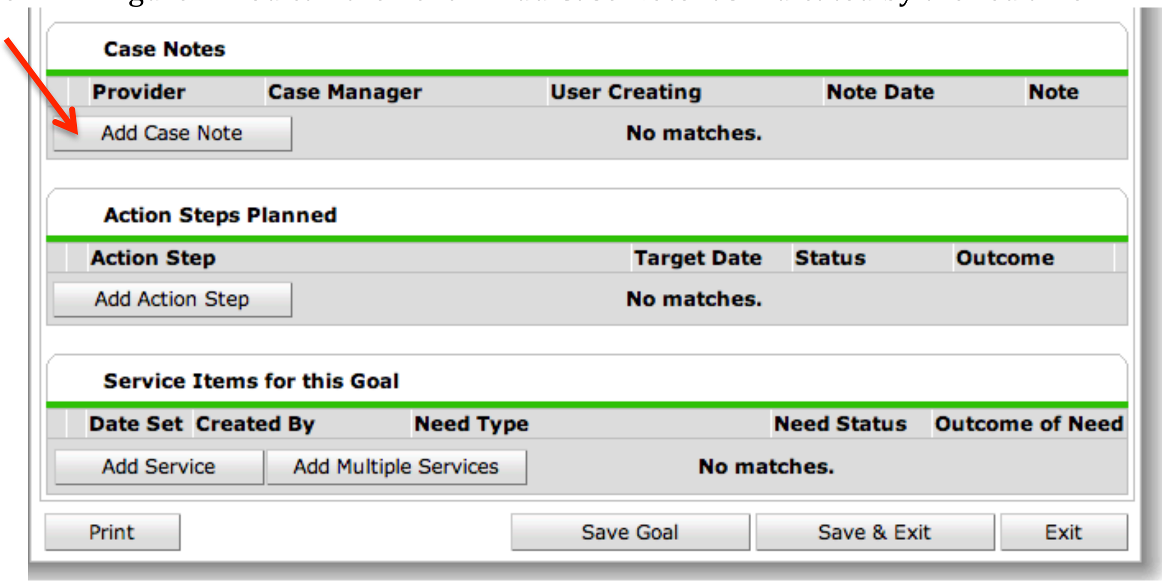

Figure 4

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.

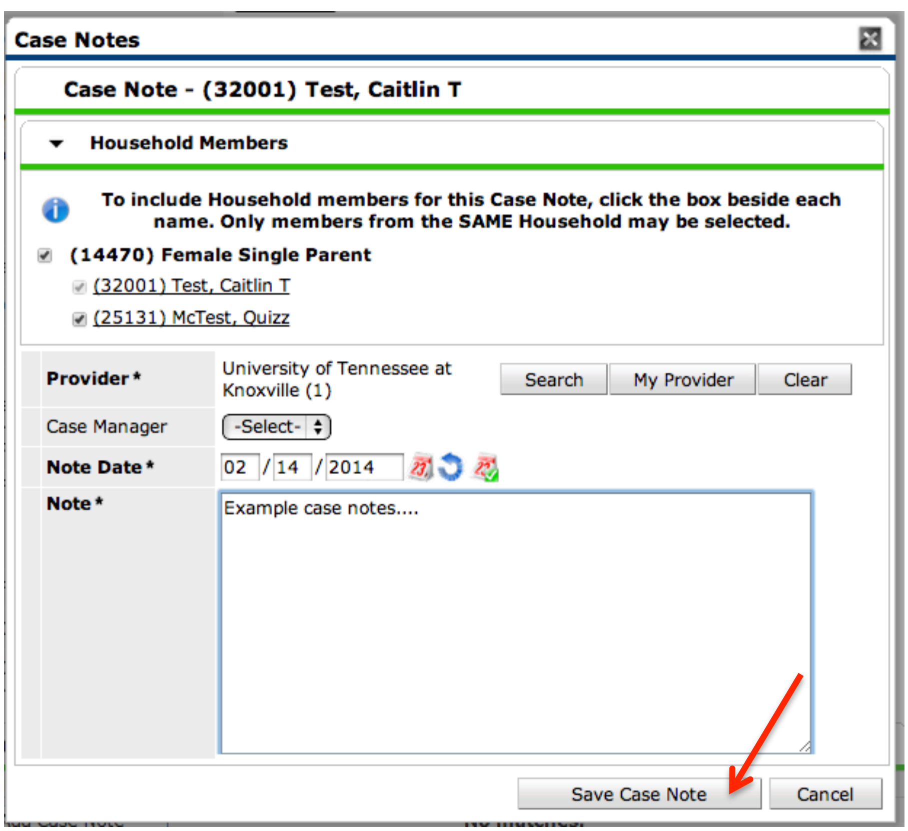

Figure 5

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.

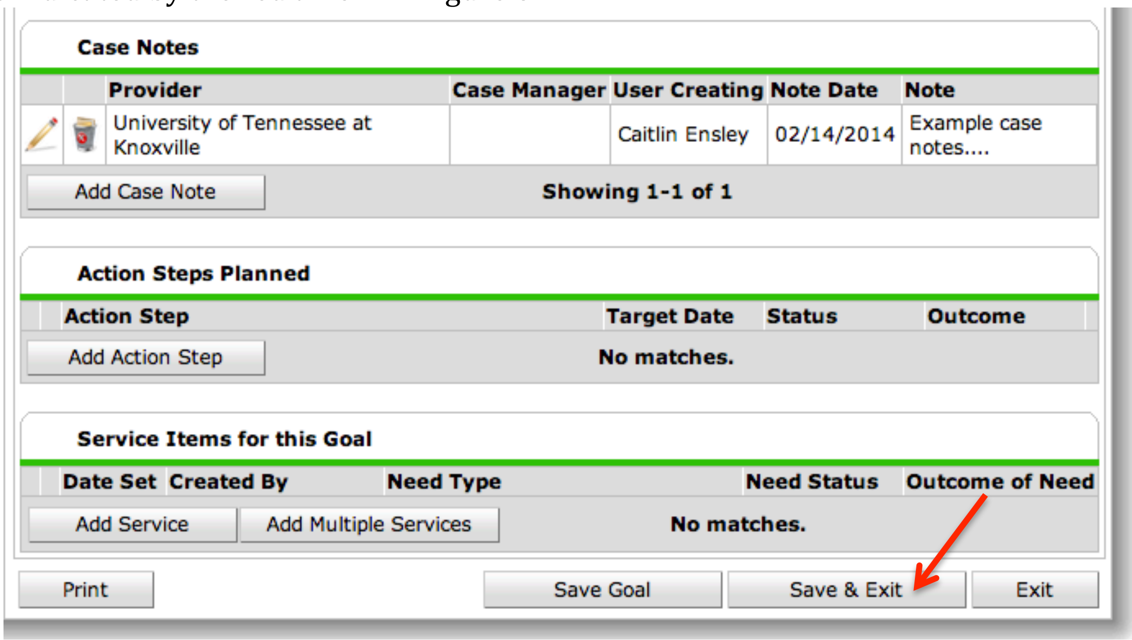

Figure 6

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.

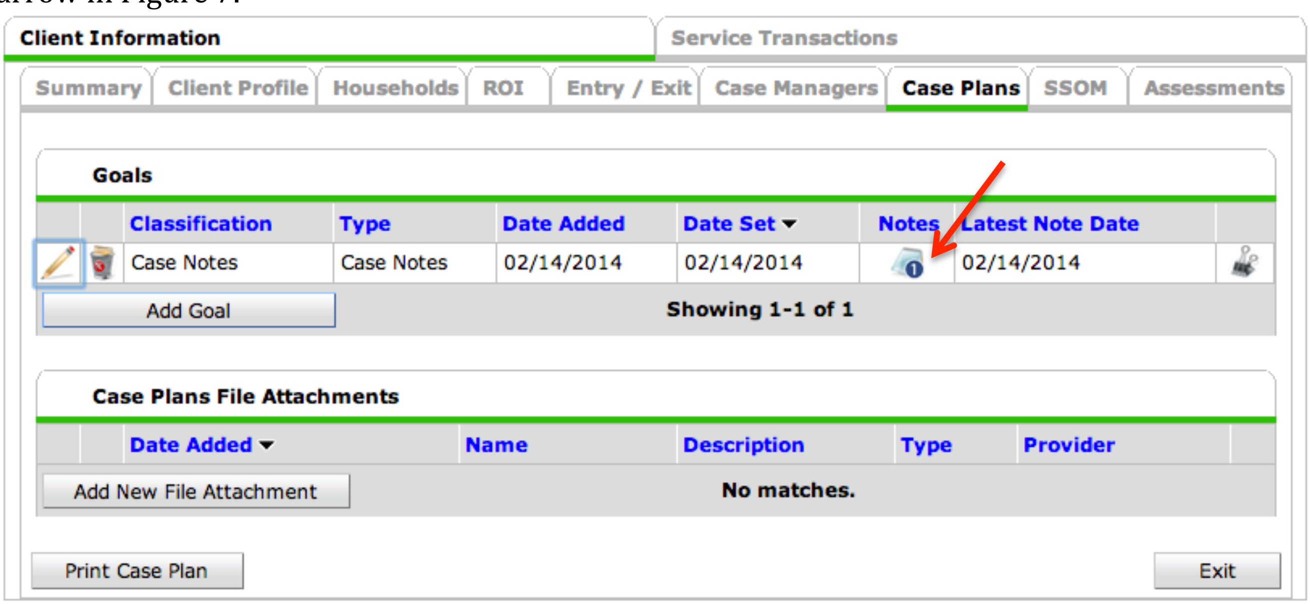

Figure 7

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

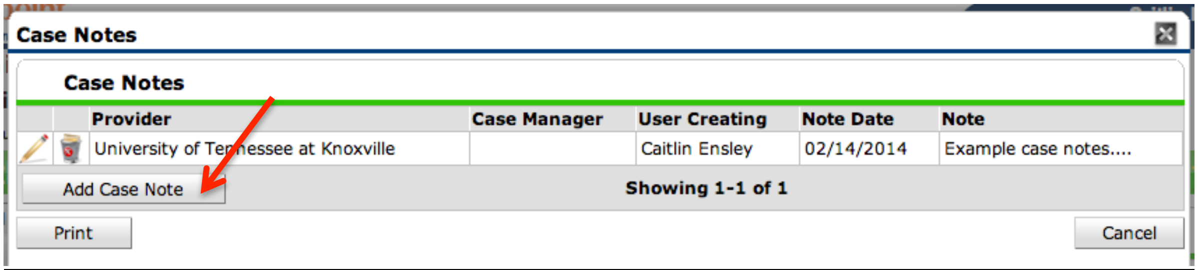

Figure 8

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

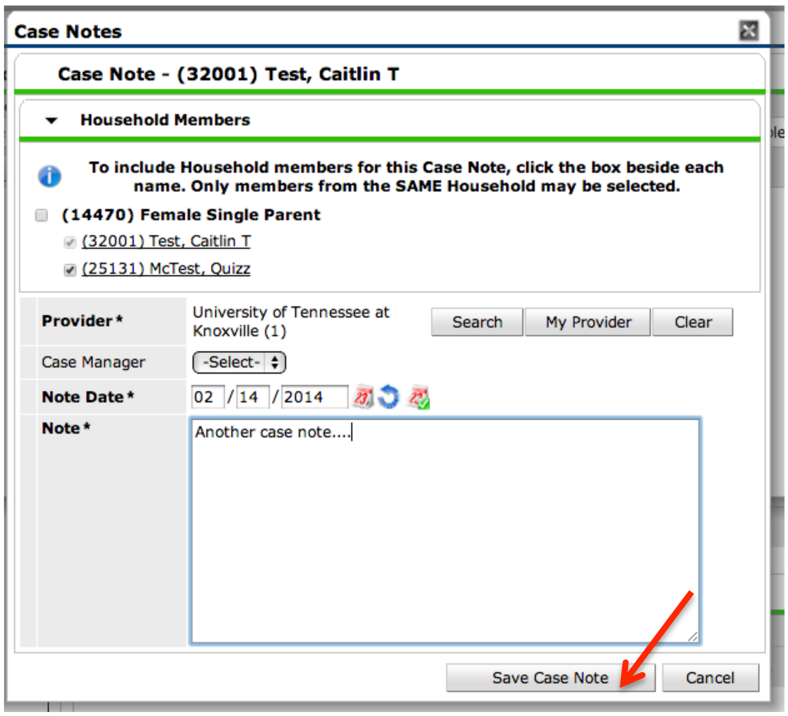

Figure 9

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

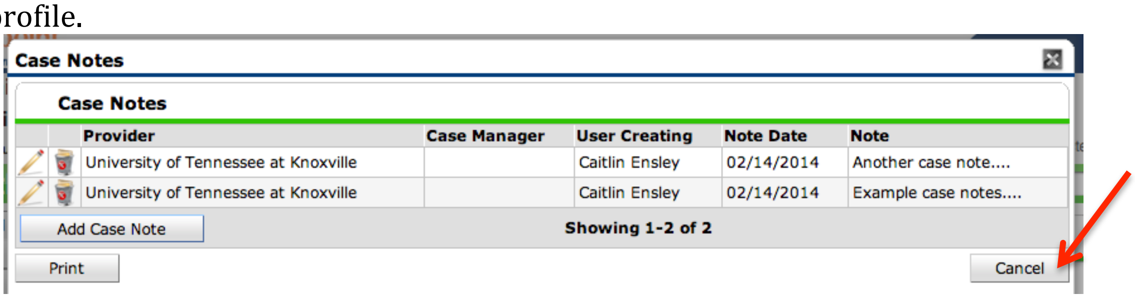

Figure 10

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.

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.

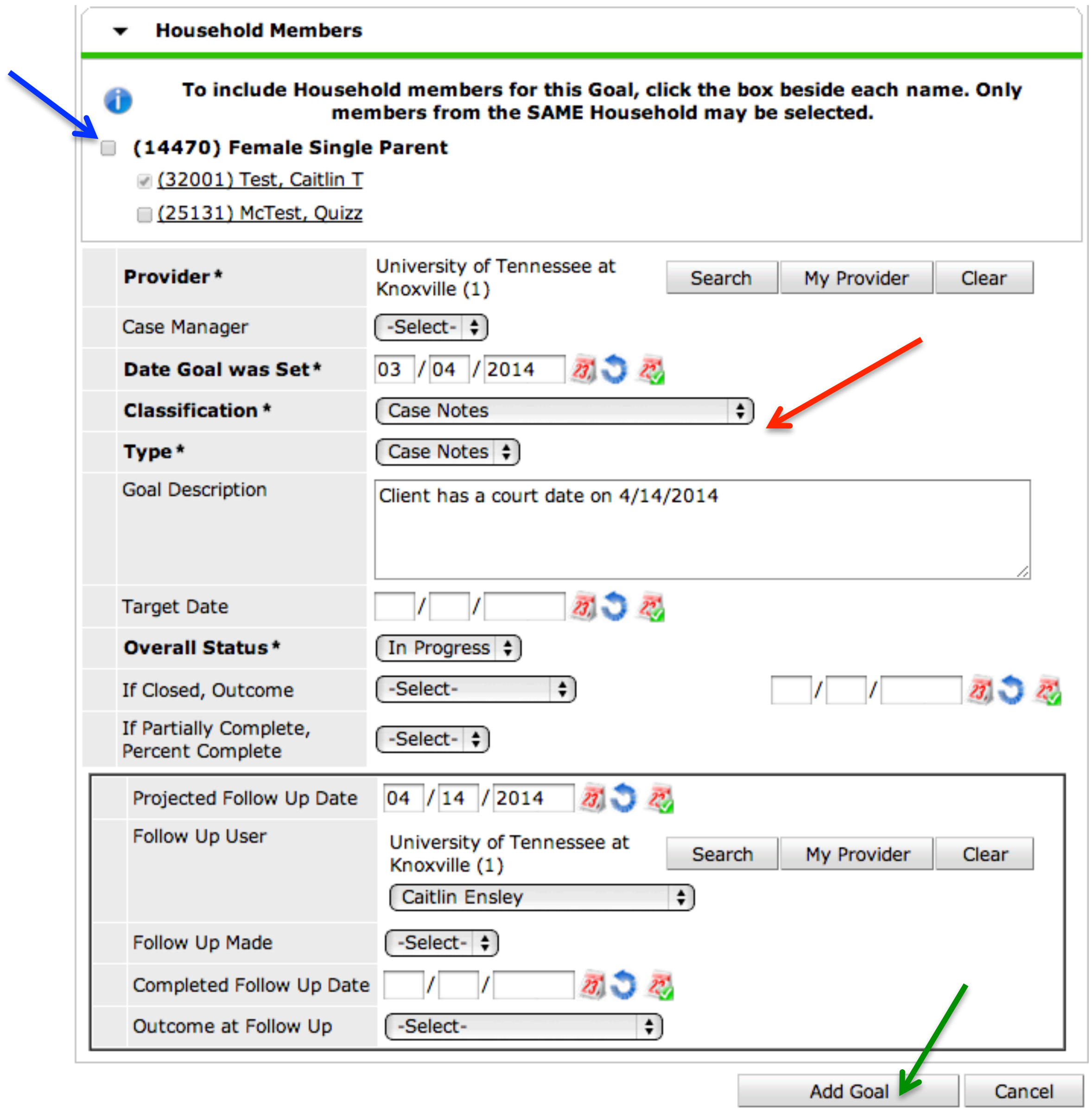

Figure 12

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.

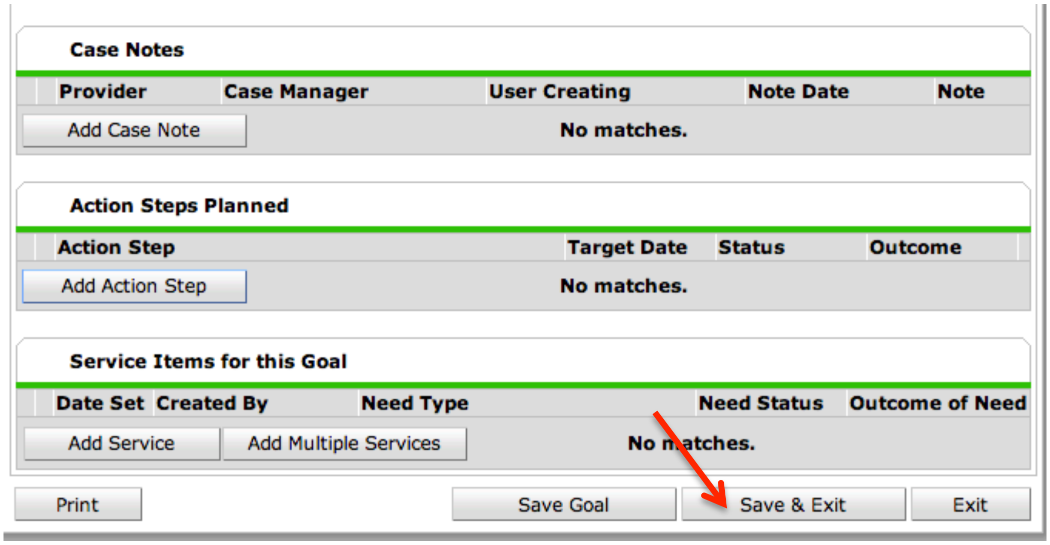

Figure 13

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

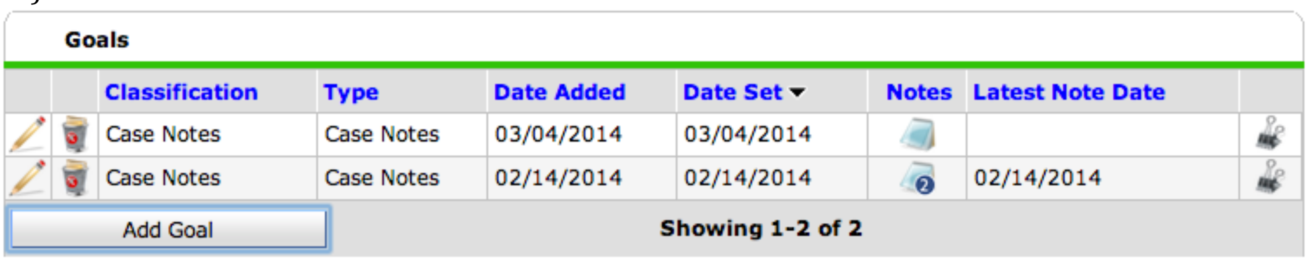

Figure 14

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

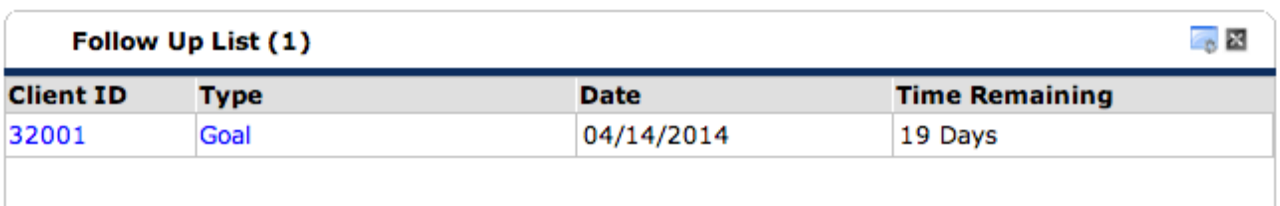

Figure 15

<u>Step 2: Completing and following up with client goals</u>

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

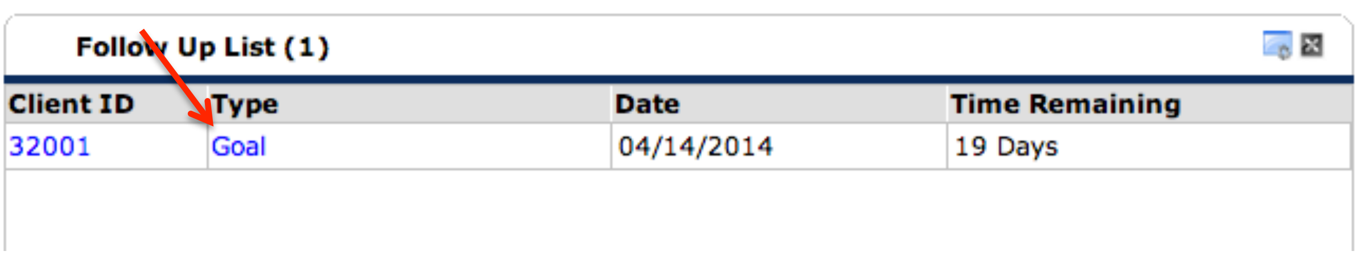

Figure 16

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."

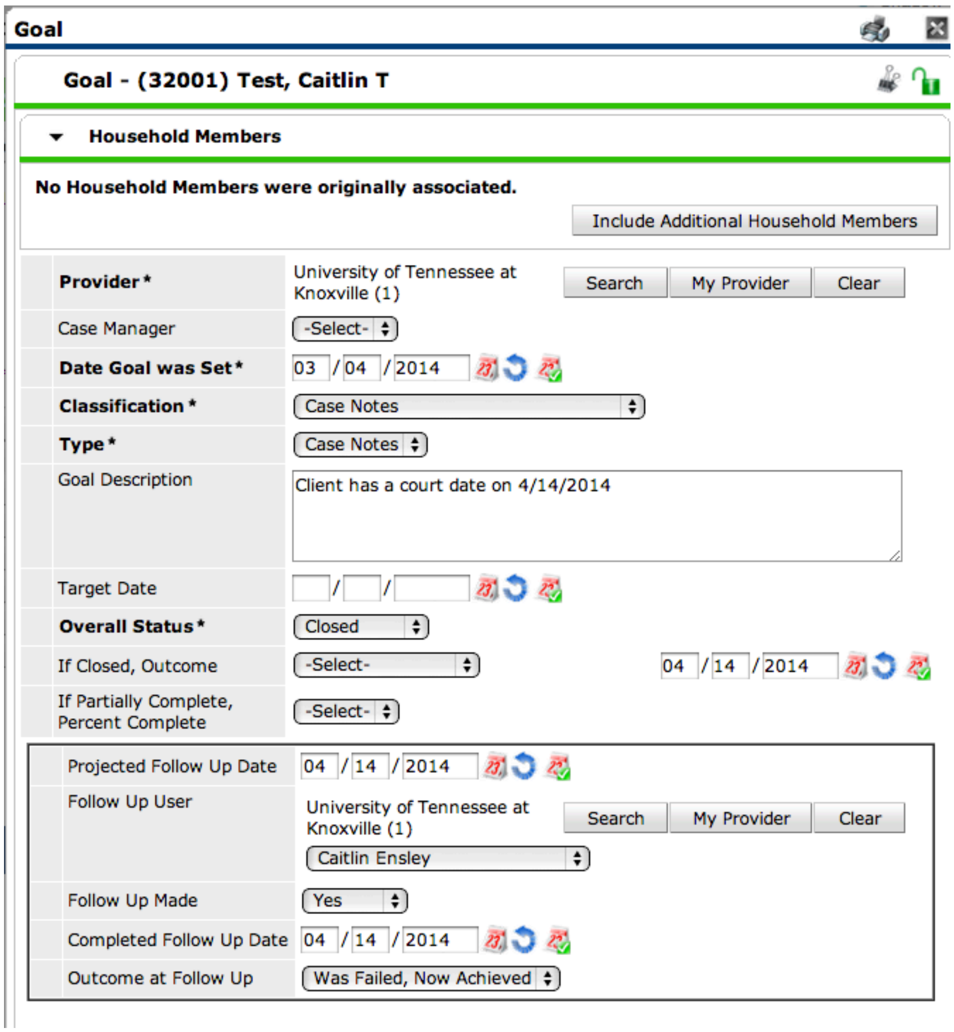

Figure 17

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.