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## USER BULLETIN: Creating Case Notes and Client Goals

### 4-March-14

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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.

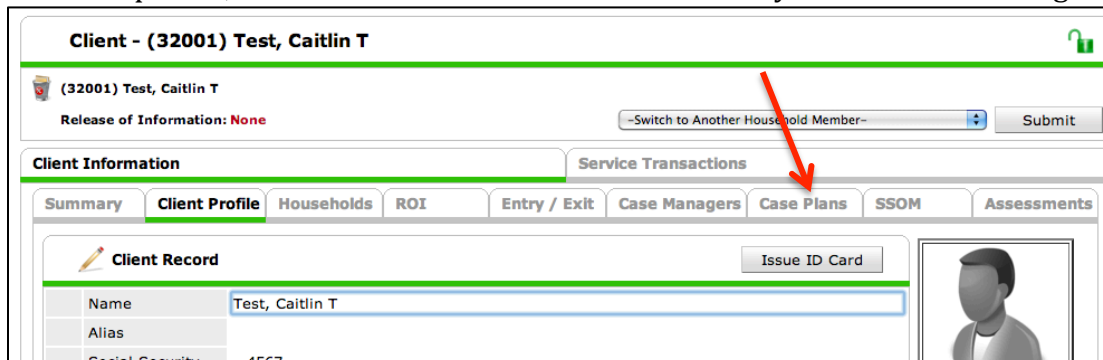


Figure 1

#### **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 web-based interface for managing goals. It is divided into three main sections, each with a table and an 'Add' button. The first section, 'Case Notes', has a table with columns: Provider, Case Manager, User Creating, Note Date, and Note. Below the table is an 'Add Case Note' button, which is highlighted by a red arrow. The second section, 'Action Steps Planned', has a table with columns: Action Step, Target Date, Status, and Outcome. Below it is an 'Add Action Step' button. The third section, 'Service Items for this Goal', has a table with columns: Date Set, Created By, Need Type, Need Status, and Outcome of Need. Below it are 'Add Service' and 'Add Multiple Services' buttons. At the bottom of the window are four buttons: '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. The title bar says 'Case Notes'. The main content area has a title 'Case Note - (32001) Test, Caitlin T'. Below this is a section for 'Household Members' with a dropdown arrow. A message icon and text state: 'To include Household members for this Case Note, click the box beside each name. Only members from the SAME Household may be selected.' There is a list of household members with checkboxes: '(14470) Female Single Parent' (checked), '(32001) Test, Caitlin T' (checked), and '(25131) McTest, Quizz' (checked). Below this are fields for 'Provider \*' (University of Tennessee at Knoxville (1)), 'Case Manager' (-Select-), and 'Note Date \*' (02 / 14 / 2014). There is a large text area for 'Note \*' with the placeholder text 'Example case notes....'. At the bottom right are two buttons: 'Save Case Note' and 'Cancel'. 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

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**Action Steps Planned**

Action Step	Target Date	Status	Outcome
No matches.			

Add Action Step

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**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

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**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

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**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.

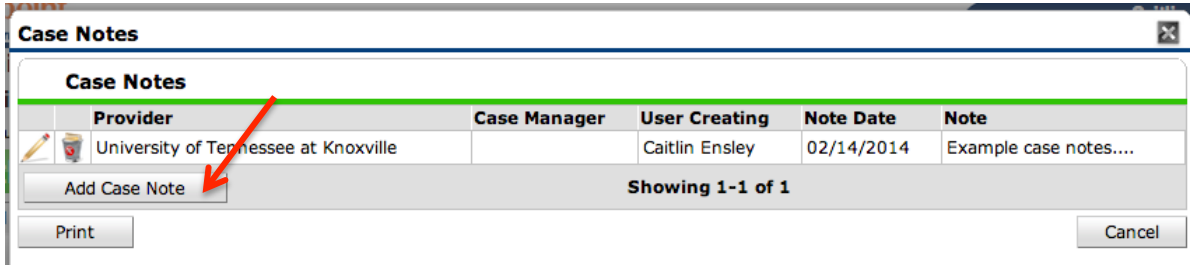


Figure 8

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

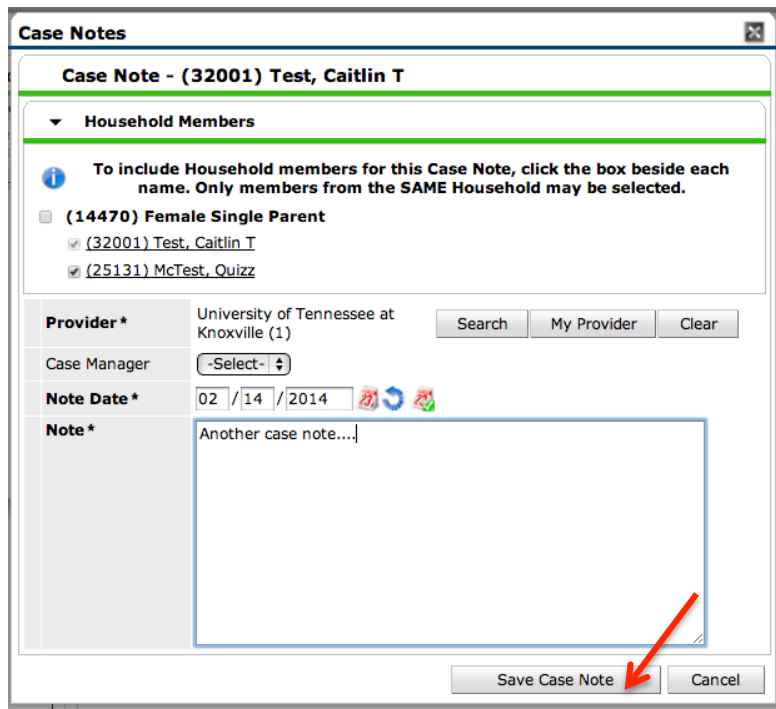


Figure 9

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

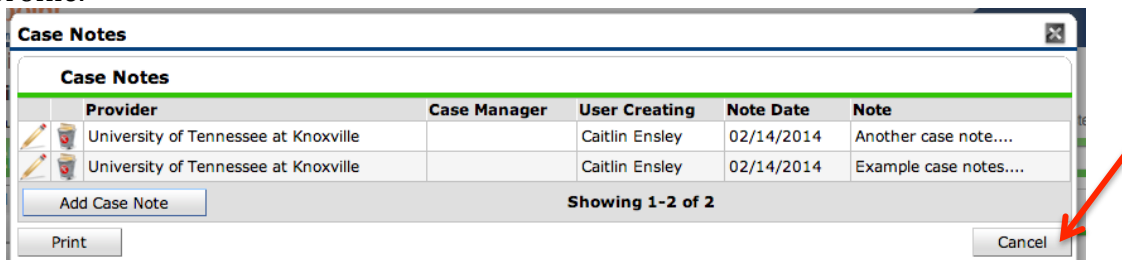
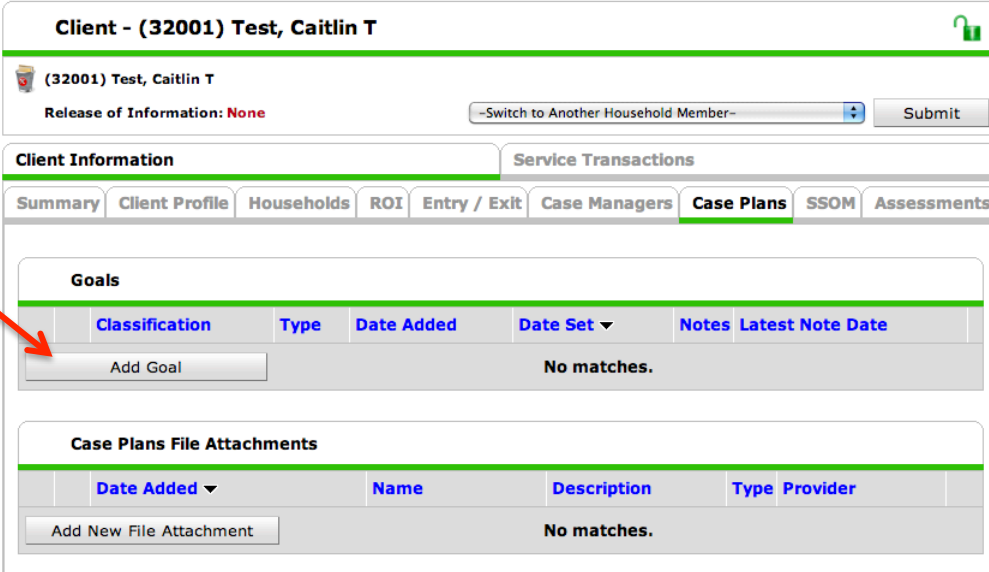


Figure 10

## 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. Below the navigation tabs, there are two sections: 'Goals' and 'Case Plans File Attachments'. The 'Goals' section has a table with columns: Classification, Type, Date Added, Date Set, Notes, and Latest Note Date. An 'Add Goal' button is located at the bottom left of this section, with a red arrow pointing to it. The 'Case Plans File Attachments' section has a table with columns: Date Added, Name, Description, Type, and Provider, and 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

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

Projected Follow Up Date	04 / 14 / 2014	<span>🔄</span> <span>🔄</span> <span>🔄</span>
Follow Up User	University of Tennessee at Knoxville (1)	<span>Search</span> <span>My Provider</span> <span>Clear</span>
	Caitlin Ensley	
Follow Up Made	Yes	
Completed Follow Up Date	04 / 14 / 2014	<span>🔄</span> <span>🔄</span> <span>🔄</span>
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](mailto:hmissupport@utk.edu) if you have any questions.**