


How to Add Daily Case Notes or Goals

This document will assist you in creating Goals, Action Steps and Case Notes. Use it as a tool to plan self-sufficiency and track outcomes.

Creating a Goal or Case Note Folder

1. Open the clients profile

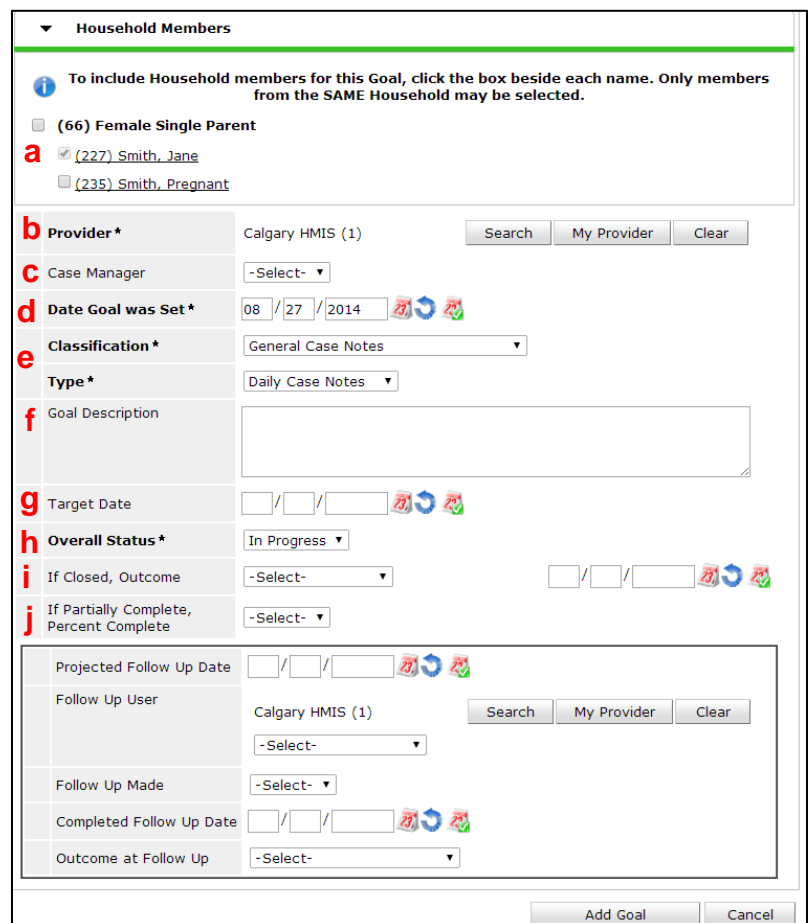


2. Click the Case Plans tab
3. Click Add Goal

Adding a Goal is like creating a file folder. Create a new goal to track the status of different opportunities for the client. (Example: Daily Case Notes, CAA, debt reduction, education - High School diploma, etc.)

⚠ Do not create a new goal every time you to add a daily case note. See below to add a note to the existing goal

4. Fill in the required fields on the pop-up menu
 - a. **Household Members:** Check off the members which this Goal would apply to
 - b. **Provider:** Confirm it is your provider
 - c. **Case Manager:** Apply a case manager as necessary.
 - d. **Date Goal Was Set:** Today's date
 - e. **Classification & Type:** Choose the appropriate option from the drop down menus
 - f. **Goal Description:** Provide any relevant additional information



- g. **Target Date:** Optional – Select a date that you would like the goal to be completed by
 - h. **Overall Status:** Choose the appropriate status
 - i. **If Closed, Outcome:** Fill in to track outcomes
 - j. **If Partially Complete, percent complete**
5. Click Add Goal *The Case Plans window will expand to allow you to input case notes, action steps and service items which should correspond to your clients goal*

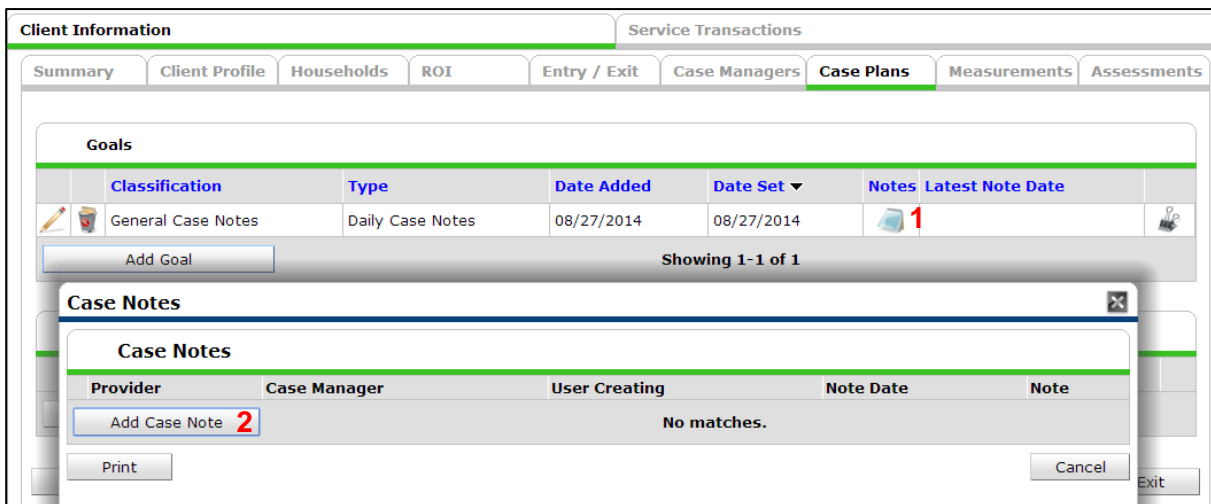
Note: The Add Service option will automatically take you out of case plans and into Service Transactions.

6. Scroll to the bottom and click Save and Continue

You will now see a Folder created for that goal

Adding a Note or Multiple Notes to a Case Plan

1. Click the Notebook icon on the goal you would like to add a note

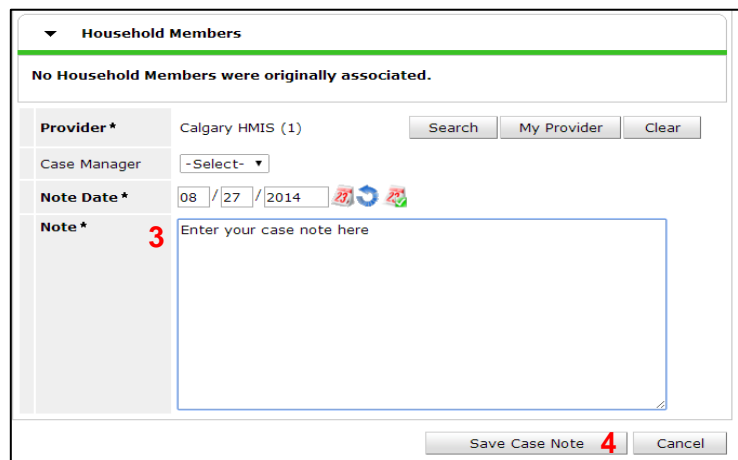


The screenshot shows the 'Case Plans' window with a table of goals. A 'Case Notes' dialog box is open over the table. The dialog box has a table with columns: Provider, Case Manager, User Creating, Note Date, and Note. The 'Add Case Note' button is highlighted with a red '2'. The dialog box also shows 'No matches.' and a 'Cancel' button.

Classification	Type	Date Added	Date Set	Notes	Latest Note Date
General Case Notes	Daily Case Notes	08/27/2014	08/27/2014	1	































2. Click add Case Note
3. On the next window enter in your note
4. Click Save Case Note

⚠ Once a note is entered you, there is no way of deleting or editing it. Be sure to check spelling and content before clicking Save Case Note.




The screenshot shows the 'Case Note' entry window. It has a title bar 'Household Members' and a message 'No Household Members were originally associated.' Below this are fields for Provider (Calgary HMIS (1)), Case Manager (-Select-), Note Date (08/27/2014), and Note (Enter your case note here). The 'Save Case Note' button is highlighted with a red '4'.




What not to do

Goals									
	Classification	Type	Date Added	Date Set ▼	Status	Outcome	Notes	Latest Note Date	
	General Case Notes	Daily Case Notes	01/30/2013	12/14/2012	Identified			06/03/2013	
	General Case Notes	Daily Case Notes	01/30/2013	12/07/2012	Identified			12/07/2012	
	General Case Notes	Daily Case Notes	11/27/2012	11/20/2012	Identified			11/20/2012	
	General Case Notes	Daily Case Notes	11/27/2012	11/19/2012	Identified			11/19/2012	
	General Case Notes	Daily Case Notes	11/27/2012	11/14/2012	Identified			11/14/2012	
	General Case Notes	Daily Case Notes	11/27/2012	11/07/2012	Identified			11/07/2012	
	General Case Notes	Daily Case Notes	11/14/2012	10/31/2012	Identified			10/31/2012	
	General Case Notes	Daily Case Notes	10/26/2012	10/24/2012	Identified			10/27/2012	
	General Case Notes	Daily Case Notes	10/26/2012	10/23/2012	Identified			10/23/2012	
	General Case Notes	Daily Case Notes	10/29/2012	10/18/2012	Identified			10/18/2012	

Add Goal Showing 1-10 of 45 First Previous Next Last

 **Do not create a new goal every time you to add a daily case note. See above on how to add a note to the existing goal**

Editing a Goal

Goals									
	Classification	Type	Date Added	Date Set ▼	Status	Notes	Latest Note Date		
	General Case Notes	Daily Case Notes	08/27/2014	08/27/2014					

Add Goal Showing 1-1 of 1

To edit a goal status simply click on the Edit icon of that goal and the Goal Information page will appear. Edit information as necessary.