

Coordinated Entry System Navigation Case Note Guide

I. Why Keep Case Notes?

The benefit of keeping detailed case notes is for a better quality service and accurate record of information for future use. Good case notes employ strategic, insightful inquiry and understanding of what's going on. It should also be relevant to the service or support being provided.

II. What information goes in case notes?



Purpose

- The reason for contact or assessment
- How contact was established ?



Assessment

- What is the participant situation
- Whereabouts of children and family?
- Brief summary of the need and issues discussed?



Plan

- What are the next steps enlight of the participant current situation
- Any information or resouces navigator provided
- Navigator initials.

III. Writing Case Notes

A good Case Note is:

- Clear and concise
- Objective, avoiding stigmatizing or biased language
- Timely, written within 2 days of contact with participant
- Captures the delivery of services



Tips for quality case notes

- Avoid compromising of safety
 - Avoid noting specific locations for anyone fleeing dangerous situations, such as DV or Human Trafficking survivors. Use code phrases instead. *(I.e. Participant is fleeing a dangerous situation and is staying in a 10-week program in Orange County.)*
- Replace deficit-based language with strength based language as
- Avoid Clichés, street talk, or jargon
- Avoid copying and pasting email and text communications
- Include a method of contact, ex: Office Visit, phone call, text, etc.
- Document any services provided

IV. Language Matters

Language matters. It shapes how we view people, which can influence how we serve and engage with participants. Strive to avoid deficit-based language that carries negative connotations, bias, and stigma. Instead, rely on strengths-based language that focused on the person, strengths, and the possibility of their recovery.

| Deficit-Based Language | Strengths-Based, Recovery Oriented Language |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| A schizophrenic, a borderline | A person living with or diagnosed with schizophrenia... |
| Addict, junkie | A person diagnosed with an addiction that experiences the following... |
| Substance abuse/abuser | Person with an addiction to substances; substance use interferes with person's life |
| Suffering from | Working to recover from; experiencing; living with |
| Resistant/non-compliant | Not open to... Chooses not to...Has own ideas... |
| Unmotivated | Person is not interested in what the system has to offer; interests and motivating incentives unclear; preferred options not available |
| Manipulative | Resourceful; really trying to get help |
| Entitled | Aware of one's rights |

V. Case Note Sample

Participant assigned for navigation by CES. Navigator made contact with participant via phone and introduced self. The participant reported sleeping in her car with three children for the last three months. Navigator asked if family would be interested in shelter and they replied yet. Navigator completed shelter matching tool in HMIS. In addition to shelter participant voiced



need for housing. Navigator provided participant with a list of required documentation needed to process eligibility for housing interventions. Navigator scheduled meeting for 11/14/2019 at 2pm to assess living situation, gather required documentation. Face to face / JB

Navigator met with participant on 11/14/2019 in the parking lot at Walmart. Navigator observed many things in the car that proved the family is sleeping in the car. Navigator and participant went through required documentation and program overview. Participant is unemployed but wants to work; when asked about employment history the client reported they've had trouble keeping a job but did not go into detail. Navigator recommended some resources the participant could look into. All required documents were collected to be uploaded in HMIS. Navigator will keep participant updated with status on weekly basis. Face to face / JB

Navigator contacted participant via phone to inform participant on 11/20/2020 a referral for RRH was accepted and Housing Case Manager will be in contact with them to begin housing process. Navigator will be closing navigation. Phone call / JB