Coordinated Entry System

Navigation Case Note Format

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. Who Can See Case Notes?

Case notes are visible to HMIS users including the investors. It is vital that case notes paint a picture of what's going on and the services provided to assist with the need.

III. 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 advice, information or encouragment navigator provided
- Navigator initals.

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IV. Writing Case Notes

The CES Case Note records important details about a participant situation and services provided to participants. It also outlines the engagement in services.

Write Case Notes That Are:

- Clear and concise
- Accurate and complete
- Timely, written within 2 days of contact with participant
- Readable with acceptable grammar
- Able to prove delivery of services

Case Notes Should:	Case Notes Should:
Avoid “diagnoses” Avoid “Clichés” Avoid “street talk” Avoid Jargon Avoid Stereotypes and prejudice Avoid copying and pasting email and text communications	Reflect delivery of service and service continuity. Communicate with other providers about what is happening with the participant. Record statements made by the participant in a clear and concise way. Record your observations in a clear and concise way. Include a method of contact. Include Initials.

V. Language Matters

It’s important to remember that language matters; see the list of strength-based verbs you can use in your case notes

Strong Verbs to use:

Advised
Focused
Assessed
Identified
Encouraged

Assisted
Recommended
Clarified
Referred
Directed

Confronted
Reflected
Structure
Discussed
Summarized

VI. Case Note Sample

Participant has been 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. Navigator completed shelter matching tool in HMIS for family. 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 assessed living situation, gather required documentation and get a better understanding of participant needs and concern. 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. Navigator asked various questions to gather case summary and assess need. 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 should look into. All required documentation were collected and will be uploaded in HMIS. A referral will be submitted on participant behalf for eligibility on housing intervention. Navigator will keep participant updated with status on weekly basis but encouraged participant to not put all her eggs in one basket. JB

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

Note: The only time including the purpose, assessment and plan would be difficult is when the participant may send the one missing document in or you may have that short interaction with them. This can be a simple note and do not need to follow the above format.

VII. Self-Check Guidelines for Case Note

To identify the proper format for your case note, review the self-check tool below. Ask yourself: Have I effectively and clearly documented the purpose, assessment and plan?

CASE NOTES	YES	NO
Purpose of the contact		
Assessment of situation and intervention used to address the documented need or concern of the participant during this meeting or prior contact leading up to this visit/contact		
Participants Response to the proposed assistance or intervention during this contact?		
Plans for next steps or next visit based on information acquired during this contact with the participant? (i.e. next visit, participant will, client plans to & Navigator plans to follow up)		
Method of contact documented (i.e. Face to Face, email, phone, text message,		
Delivery of service - Does the case note prove delivery of service with information that is accurate, objective, specific, concise, consistent, substantive, and necessary?		