

# Case Manager, Case Plan & Case Note Workflow

Workflow for recording Case Manager, Case Plan, & Case Notes in KYHMIS

1

Navigate to KYHMIS. <https://wscs.wellsky.com/kyhomeless/com.bowmansystem.s.sp5.core.ServicePoint/index.html#loadClient;clientId=263826>

## Case Manager

2

Click on the "Case Managers" tab within the Client Record.

The screenshot shows the KYHMIS Client Record interface for a client named 'Kitty, Hello'. The interface includes a sidebar with navigation options like 'Home', 'Clients', 'Resources', 'Shelters', 'Scans', 'Reports', 'Admin', and 'Logout'. The main content area displays client information, including name, date of birth, race and ethnicity, gender, social security number, and military status. A 'Case Managers' tab is highlighted with an orange circle. Below the client information, there are sections for 'Release of Information' and 'Entry/Exits'.

Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans
Added to the system 06/17/2016 08:34 AM						
Name	Kitty, Hello		Social Security	***-**-6789		
Date of Birth	06/13/1990 (Age 34)		U.S. Military Veteran?	No (HUD)		
Race and Ethnicity	Native Hawaiian or Pacific Islander White					
Gender	Woman (Girl, if child)					

Provider	Permission Start Date	End Date
No matches.		

Program	Type	Project Start Date	Exit Date
Metro RCS Homeless Services Div - LOU	Basic	09/18/2024	

### 3 Click "Add Case Manager".

The screenshot shows the 'Client - (263826) Kitty, Hello' profile page. The 'Case Managers' tab is selected, displaying a table with the following data:

Name	Provider	Phone Number	Start Date	End Date
Margaret Ann (test) Smith	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS		08/07/2024	
Kim Webb	ZZZ-INACTIVE 10/1/2021-Franklin County Women and Family Shelter-OTH-ES-BOS	(502) 352-2843	08/14/2018	
Kenzie Strubank	ZZZ-INACTIVE 10/31/2020-Bluegrass LPC Coordinated Entry-OTH-BOS	502-223-1834 x 1119	06/20/2018	
Sam Chanda Young	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS		07/15/2024	07/15/2024

The 'Add Case Manager' button is highlighted with an orange circle. The page also shows a sidebar with navigation options like 'Home', 'Clients', 'Resources', 'Shelters', 'Scans', 'Reports', 'Admin', and 'Logout'.

### 4 Select the Case Manager.

"Me" will default to you (the user entering the information).

The screenshot shows the 'Add Case Manager' form for 'Case Manager - (263826) Kitty, Hello'. The 'Household Members' section is expanded, showing a list of members with checkboxes:

- (77344) Single
- (263826) Kitty Hello (Left Household: 05/01/2018)
- (115045) Couple w. Dependent Children
  - (284320) Frehley, Paul Daniel
  - (263826) Kitty Hello
  - (100) Squarepants, Spongebob

The 'Type' field has three radio buttons: 'Community Services User', 'Me' (selected), and 'Other'. The 'Name' field is filled with 'Margaret Ann (test) Smith'. The 'Provider' field is set to 'Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)'. The 'Start Date' is '09 / 01 / 2024'. The 'End Date' is empty. The 'Add Case Manager' button is highlighted with an orange circle.

5 "Other" will allow manually entered Case Manager information.

The screenshot shows a sidebar on the left with navigation options: Favorites, Home, Clients, Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area displays a form for adding household members. At the top, an information icon and text state: "To include Household members for this Case Manager, click the box beside each name. Only r from the SAME Household may be selected." Below this, there are three household types with checkboxes: (77344) Single, (115045) Couple w. Dependent Children, and (100) Squarepants. Under (77344) Single, (263826) Kitty, Hello (Left Household: 05/01/2018) is checked. Under (115045) Couple w. Dependent Children, (284320) Frehley, Paul Daniel and (263826) Kitty, Hello are checked, while (100) Squarepants, Spongebob is not. Below the household list, there are radio buttons for "Type \*": "Community Services User", "Me", and "Other". The "Other" radio button is highlighted with an orange circle. Below the radio buttons are input fields for Name, Title, Phone Number, and Email Address. The Provider field is set to "Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS".

6 "Community Services User" allows you to pick from a drop-down of users for that Provider.

Provider will default to the Provider the user is Entering Data As (EDA).

The screenshot shows the same sidebar as in the previous image. The main content area displays the "Household Members" section. A dropdown menu is open, showing a list of users with their names and IDs. The user "Sam Chanda Young (4085)" is highlighted with an orange circle. The dropdown menu also includes a "Select User \*" field. Below the dropdown, the "Type \*" radio buttons are visible, with "Other" selected. The "Provider \*" field is set to "Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)". The "Start Date \*" is set to "09 / 01 / 2024". The "End Date" field is empty. The "Submit" button is visible at the bottom right of the form.

7

Fill in the relevant information, and click "Add Case Manager".

The screenshot shows a form for adding a case manager. The form fields are as follows:

- Type \***: Radio buttons for  Community Services User,  Me, and  Other.
- Select User \***: A dropdown menu showing "Kentucky Housing Corporation - BOS (1889)" and "Margaret Ann (test) Smith (3189)".
- Name \***: Text input field containing "Margaret Ann (test) Smith".
- Title**: Empty text input field.
- Phone Number**: Empty text input field.
- Email Address**: Text input field containing "DUP3189@gmail.com".
- Provider \***: A dropdown menu showing "Kentucky Housing Corporation - BOS (1889)".
- Start Date \***: Date picker showing "09 / 01 / 2024" with calendar and refresh icons.
- End Date**: Empty date picker with calendar and refresh icons.

At the bottom of the form, there are two buttons: "Add Case Manager" (highlighted with an orange circle) and "Cancel".

Case Number	Start Date	End Date
343	08/07/2024	
4 x	08/14/2018	
	06/20/2018	
	07/15/2024	07/15/2024

## Case Plans

8 Click "Case Plans" tab within the Client Record.

The screenshot shows the client record for "Kitty, Hello" (ID: 263826). The interface includes a left sidebar with navigation options like Home, Clients, Resources, and Logout. The main content area displays client information, including name, date of birth, and social security number. A "Processing..." status is shown above the tabs. The "Case Plans" tab is highlighted with an orange circle. Below the tabs, there are sections for "Release of Information", "Entry/Exits", "Households", and "Services".

Name	Kitty, Hello	Social Security	***.**-6789
Date of Birth	06/13/1990 (Age 34)	U.S. Military Veteran?	No (HUD)
Race and Ethnicity	Native Hawaiian or Pacific Islander White		
Gender	Woman (Girl, if child)		

Provider	Permission Start Date	End Date
No matches.		

Program	Type	Project Start Date	Exit Date
Metro RCS Homeless Services Div - LOU	Basic	09/18/2024	

9 Then click "Add Goal".

The screenshot shows the same client record for "Kitty, Hello", but now the "Case Plans" tab is selected. The "Goals" section is visible, showing a table with columns for Classification, Type, Date Added, Date Set, Notes, and Latest Note Date. The "Add Goal" button is highlighted with an orange circle. Below the goals section, there is a "Case Plans File Attachments" section with an "Add New File Attachment" button. At the bottom, there are "Print Case Plan" and "Exit" buttons.

Classification	Type	Date Added	Date Set	Notes	Latest Note Date
No matches.					

Date Added	Name	Description	Type	Provider
No matches.				



## Tip!

*In this section, Goal Classification, Action Steps, Case Notes and related Service Transactions can be added.*

10

Select the Case Manager who will be working with the client.

Enter the "Date Goal was Set".

The screenshot shows a web application interface with a dark sidebar on the left containing navigation links: Home, Clients, Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area displays a form for goal management. At the top, there are two radio button options: (77344) Single and (115045) Couple w. Dependent Children. Under the selected option, there are three checkboxes for client selection: (263826) Kitty\_Hello (Left Household: 05/01/2018), (284320) Frehley, Paul Daniel, and (100) Squarepants, Spongebob. The form fields are as follows:

- Provider \***: Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)
- Case Manager**: -Select- (dropdown menu is open)
- Date Goal was Set \***: 09 / 10 / 2024 (calendar icon)
- Classification \***: -Select- (dropdown menu)
- Type \***: -Select- (dropdown menu)
- Goal Description**: (text area)
- Target Date**: (calendar icon)
- Overall Status \***: (dropdown menu)
- If Closed, Outcome**: Margaret Ann (test) Smith
- If Partially Complete, Percent Complete**: \*Sam Chanda Young\*
- Projected Follow Up Date**: (calendar icon)

On the right side of the form, there is a 'Submit' button and an 'Exit' button. The 'Case Plans' section is partially visible on the right edge.

## 11 Select your "Classification" and "Type" - *what kind of goal is it?*

The screenshot shows a web application interface with a dark sidebar on the left containing navigation items: Home, Clients, Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area is a form for creating a goal. A dropdown menu is open over the 'Classification' field, listing various categories: -Select-, Economic, Education, Employment, Environment and safety, Financial Stability, Health, Health Improvement, Household necessities, Housing, Interpersonal Relationships, Legal, Mental Health Treatment, and Notes not associated with a goal. An orange circle highlights the 'Housing' option. The form fields include: Provider \* (Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)), Case Manager (Margaret Ann (test) Smith), Date Goal was Set \* (09 / 10 / 2024), Classification \* (Housing), Type \* (Move to Permanent Housing), Goal Description (empty text area with an orange circle), Target Date, Overall Status \*, If Closed, Outcome, If Partially Complete, Percent Complete, Projected Follow Up Date, and Follow Up User (Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)). A 'Submit' button is visible at the top right, and an 'Exit' button is at the bottom right.

## 12 Enter your "Goal Description".

The screenshot shows the same web application interface as in step 11. The 'Goal Description' field is now the focus, with an orange circle highlighting it. The form is filled with data from the previous step: Provider \* (Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)), Case Manager (Margaret Ann (test) Smith), Date Goal was Set \* (09 / 10 / 2024), Classification \* (Housing), Type \* (Move to Permanent Housing), Goal Description (empty text area with an orange circle), Target Date, Overall Status \*, If Closed, Outcome, If Partially Complete, Percent Complete, Projected Follow Up Date, and Follow Up User (Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)). A 'Submit' button is visible at the top right, and an 'Exit' button is at the bottom right.

13 Enter your "Target Date".

Date Goal was Set *	09 / 10 / 2024
Classification *	Housing
Type *	Move to Permanent Housing
Goal Description	Client would like to move to a PSH program and maintain stable housing
Target Date	/ /
Overall Status *	-Select-
If Closed, Outcome	-Select-
If Partially Complete, Percent Complete	-Select-
Projected Follow Up Date	/ /
Follow Up User	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS

14 If necessary, create a Follow Up.

Target Date	11 / 01 / 2024
Overall Status *	In Progress
If Closed, Outcome	-Select-
If Partially Complete, Percent Complete	-Select-
Projected Follow Up Date	10 / 01 / 2024
Follow Up User	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) Margaret Ann (test) Smith
Follow Up Made	-Select-
Completed Follow Up Date	/ /
Outcome at Follow Up	-Select-

Add Goal Cancel



### Tip!

Once the goal is saved, different areas on the screen are available to be completed. It depends on your agency's workflow which of these areas would need to be filled out.

## 15 Click "Add Goal"

The screenshot shows a form for creating a goal. The form includes several fields and buttons:

- Date:** 11 / 01 / 2024 (with calendar, refresh, and calendar icons)
- Status:** In Progress (dropdown menu)
- Outcome:** -Select- (dropdown menu) and a date field (with calendar, refresh, and calendar icons)
- Complete, complete:** -Select- (dropdown menu)
- Follow Up Date:** 10 / 01 / 2024 (with calendar, refresh, and calendar icons)
- User:** Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) (dropdown menu) and Margaret Ann (test) Smith (dropdown menu)
- Made:** -Select- (dropdown menu)
- Follow Up Date:** (empty date field with calendar, refresh, and calendar icons)
- at Follow Up:** -Select- (dropdown menu)

At the bottom of the form, there are two buttons: "Add Goal" (highlighted with an orange circle) and "Cancel". To the right of the form, there is a vertical sidebar with an "Exit" button at the top.

## Case Notes

**16** Click "Add Case Note".

Follow Up User	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) ▼ Margaret Ann (test) Smith ▼
Follow Up Made	-Select- ▼
Completed Follow Up Date	/ /  
Outcome at Follow Up	-Select- ▼

  

Case Notes				
Provider	Case Manager	User Creating	Note Date	Note
<a href="#">Add Case Note</a>		No matches.		

  

Action Steps Planned			
Action Step	Target Date	Status	Outcome
<a href="#">Add Action Step</a>		No matches.	

  

Service Items for this Goal				
Date Set	Created By	Need Type	Need Status	Outcome of Need
<a href="#">Add Service</a>		<a href="#">Add Multiple Services</a>		
No matches.				

**17** Enter your Case Note information.

Entering Case Notes allows you to record:

- Progress & accomplishments towards the Client's goals.
- Important notes for other staff or to document a call with a landlord, etc.
- Times you met with the Client or talked to them over the phone, etc.
- Add Action Plan- *click "Add Action Step" field.*

## 18 Click "Save Case Note"

**Case Note - (263826) Kitty, Hello**

▼ Household Members

No Household Members were originally associated.

**Provider \*** Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) ▼

Case Manager Margaret Ann (test) Smith ▼

**Note Date \*** 09 / 10 / 2024 📅 🔄 📅

**Note \*** Met with client today to fill out their Case Plan and major goals. Client would like to focus on obtaining PSH and maintaining stable housing. Worked with the client on searching for available housing options.

**Save Case Note** **Cancel**

Date Set	Created By	Need Type	Need Status	Outcome of Need
<b>Add Service</b>		<b>Add Multiple Services</b>		
No matches.				

**Print** **Save Goal** **Save & Exit** **Exit**



### Tip!

*The questions in bold are required to be answered to save the goal.*

*Create Goals, Case Notes, and Action Steps to assist clients in planning self-sufficiency and tracking outcomes!*

19 Click "Save & Exit" when finished.

Outcome at Follow up:

**Case Notes**

Provider	Case Manager	User Creating	Note Date	Note
  Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS	Margaret Ann (test) Smith	Kristin Murley	09/10/2024	Met with client today to fill out their Case Plan and major goals. Client would like to focus on obtaining PSH and maintaining stable housing. Worked with the client on searching for available housing options.

[Add Case Note](#) Showing 1-1 of 1

**Action Steps Planned**

Action Step	Target Date	Status	Outcome
  Filled out an application with ABC PSH Program.	10/01/2024	In Progress	

[Add Action Step](#) Showing 1-1 of 1

**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](#)