

# Adding Case Notes and Client Notes in HMIS

Learn how to document client progress by adding housing goals, case notes, and action steps within the HMIS system. This guide provides a walk through for recording notes and logging important client interactions, helping to better communicate agency to agency and keep track of client progress.


Client notes/Case notes should not be uploaded as an attachment if possible. Attachments are for things like signed ROI forms, documents, etc.

## CASE NOTES (Goals)

### 1 Open your client's HMIS profile

Added to the system 04/23/2026 07:58 AM

Name	Rizzo, Frank	Social Security	
Date of Birth		U.S. Military Veteran?	
Race and Ethnicity			
Sex			



#### Release of Information

Provider	Permission	Start Date	End Date
No matches.			

[Add ROI](#)

#### Entry/Exits

Program	Type	Project Start Date	Exit Date
No matches.			

[Add Entry / Exit](#)

#### Households

ID	Type	Head of Household	Relationship
No matches.			

[Search Existing Households](#) [Start New Household](#)

#### Services

Start Date	End Date	Provider
No matches.		

[Add Service](#) [Add Multiple Services](#)

#### Shelter Stays

Start Date	End Date	Provider
No matches.		

#### Goal

Classification	Type	Date Added	No
Housing	Achieve housing stability	04/23/2026	1
Housing	Achieve housing stability	04/23/2026	1

[Add Goal](#) Showing 1-2 of 2

#### Case Managers

#### Outstanding Incoming Referrals

## 2 Click the Summary tab.

The screenshot shows a web application interface for client management. On the left is a dark sidebar with navigation options: Clients, Calls, Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area is titled 'Client Information' and has a 'Summary' tab selected, which is circled in orange. Below the tab are several sections: 'Client Profile' (Name: Rizzo, Frank; Date of Birth; Race and Ethnicity; Sex; Social Security; U.S. Military Veteran?), 'Release of Information' (table with columns: Provider, Permission, Start Date, End Date; button: Add ROI; text: No matches.), 'Households' (table with columns: ID, Type, Head of Household, Relationship; buttons: Search Existing Households, Start New Household), 'Shelter Stays' (table with columns: Start Date, End Date, Provider; text: No matches.), 'Entry/Exits' (table with columns: Program, Type, Project Start Date; button: Add Entry / Exit; text: No matches.), 'Services' (table with columns: Start Date, End Date, Provider; buttons: Add Service, Add Multiple Services; text: No matches.), and 'Goal' (table with columns: Classification, Type, Date Added; rows: Housing - Achieve housing stability - 04/23/2026; button: Add Goal).

## Goal Setup

## 3 Click Add Goal.

This screenshot shows the same client information page as above, but with the 'Add Goal' button in the 'Goal' section circled in orange. The 'Goal' table contains two rows of data: 'Housing' with 'Achieve housing stability' and '04/23/2026'. Below the table, the text 'Showing 1-2 of 2' is visible. The 'Add Goal' button is located at the bottom of the table.

4 Select the most appropriate Goal from the Classification dropdown.

The screenshot shows a web application interface for managing client goals. A modal window titled "Goal - (23) Rizzo, Frank" is open, displaying various fields for goal creation. The "Classification" dropdown menu is highlighted with an orange circle and has "Housing" selected. Other visible fields include "Provider" (FL505 - Homelessness And Housing Alliance (3349)), "Date Goal was Set" (05 / 06 / 2026), "Type" (set to "-Select-"), and "Overall Status" (set to "-Select-"). The background shows a sidebar with navigation options like "Clients", "Calls", "Resources", "Shelters", "Scans", "Reports", "Admin", and "Logout".

5 Type the Goal Description into the provided field.

This screenshot shows the same "Goal" form as in the previous step, but now the "Goal Description" text area is highlighted with an orange circle, indicating where the user should enter the goal's description. The "Classification" dropdown remains set to "Housing". The rest of the form fields and the application interface are consistent with the previous screenshot.

## 6 Set the most appropriate status, usually it will be "identified" to start out

This Client is not a member of any Households.

Provider \* FL505 - Homelessness And Housing Alliance (3349) Search My Provider Clear

Case Manager -Select-

Date Goal was Set \* 05 / 06 / 2026

Classification \* Housing

Type \* -Select-

Goal Description Client is literally homeless and seeking emergency shelter and hopes to work towards obtaining stable housing.

Target Date / /

Overall Status \* **Identified**

If Closed, Outcome -Select-

If Partially Complete, Percent Complete -Select-

Projected Follow Up Date / /

Follow Up User FL505 - Homelessness And Housing Alliance (3349) Search My Provider Clear

Follow Up Made -Select-

Completed Follow Up Date / /

Outcome at Follow Up -Select-

Project Start Date No matches.

Date	Provider
g stability	04/23/2026
g stability	04/23/2026

Showing 1-2 of 2

Provider	Need
No matches.	

## 7 Select the most appropriate Type.

Case Manager -Select-

Date Goal was Set \* 05 / 06 / 2026

Classification \* Housing

Type \* **Achieve housing stability**

Goal Description Client is literally homeless and seeking emergency shelter and hopes to work towards obtaining stable housing.

Target Date / /

Overall Status \* Identified

If Closed, Outcome -Select-

If Partially Complete, Percent Complete -Select-

Projected Follow Up Date / /

Follow Up User FL505 - Homelessness And Housing Alliance (3349) Search My Provider Clear

Follow Up Made -Select-

Completed Follow Up Date / /

Outcome at Follow Up -Select-

Add Goal Cancel

Project Start Date No matches.

Date	Provider
g stability	04/23/2026
g stability	04/23/2026

Showing 1-2 of 2

Provider	Need
No matches.	

8

Click Add Goal to save the initial entry.

The screenshot shows a software interface with a central form for adding a goal. The form includes the following fields:

- Goal Description: Client is literally homeless and seeking emergency shelter and hopes to work towards obtaining stable housing.
- Target Date: / /
- Overall Status \*: Identified
- If Closed, Outcome: -Select-
- If Partially Complete, Percent Complete: -Select-
- Projected Follow Up Date: / /
- Follow Up User: FL505 - Homelessness And Housing Alliance (3349) (with Search, My Provider, and Clear buttons)
- Follow Up Made: -Select-
- Completed Follow Up Date: / /
- Outcome at Follow Up: -Select-

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

The background interface shows several tables with "No matches." results:

- Households table with columns ID and Type.
- Shelter Stays table with columns Start Date and Shelter Type.
- Case Management table with columns Name and Add Case Management.
- Outstanding table with columns Referral Date, Referred To Provider, and Need Type.
- Table with columns Date and Provider.
- Table with columns Date Added and Notes.
- Table with columns Provider and Need Type.

An "Exit" button is located at the bottom right of the interface.

## Case Documentation

9 Click Add Case Note. This is where you can include details.

The screenshot shows a web application interface for case management. On the left, there is a sidebar with a dark blue background and several menu items: 'Case Management', 'Name', 'Add Case M...', 'Outstanding', 'Referral Data', and 'Add Refe...'. The main content area is divided into several sections. At the top, there is a form for 'Follow Up' with fields for 'Projected Follow Up Date', 'Follow Up User' (with a dropdown menu showing 'FL505 - Homelessness And Housing Alliance (3349)'), 'Follow Up Made', 'Completed Follow Up Date', and 'Outcome at Follow Up'. Below this is a section titled 'Case Notes' with a table that has columns for 'Provider', 'Case Manager', 'User Creating', 'Note Date', and 'Note'. An orange circle highlights the 'Add Case Note' button in this section. Below the 'Case Notes' section is 'Action Steps Planned' with a table for 'Action Step', 'Target Date', 'Status', and 'Outcome', and an 'Add Action Step' button. At the bottom is 'Service Items for this Goal' with a table for 'Date Set', 'Created By', 'Need Type', 'Need Status', and 'Outcome of Need', and buttons for 'Add Service' and 'Add Multiple Services'. At the very bottom, there are buttons for 'Print', 'Save Goal', 'Save & Exit', and 'Exit'.

10 Enter a detailed case note documenting the client's assessment results, housing barriers, and follow-up plan, or whatever relevant information to their situation.

The screenshot shows the same web application interface as in step 9, but with a 'Case Note' dialog box open. The dialog box has a title bar that says 'Case Note' and a close button. Inside the dialog, it says 'Case Note - (23) Rizzo, Frank'. Below this, there is a section for 'Household Members' with a dropdown arrow and the text 'This Client is not a member of any Households.' Below that, there is a form for the case note with fields for 'Provider \*' (with a dropdown menu showing 'FL505 - Homelessness And Housing Alliance (3349)'), 'Case Manager' (with a dropdown menu showing '-Select-'), 'Note Date \*' (with a date picker showing '05 / 06 / 2026'), and 'Note \*' (with a large text area). At the bottom of the dialog, there are buttons for 'Save Case Note' and 'Cancel'. The background of the application is dimmed, showing the same sidebar and main content area as in step 9.

Start Date

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Case Manager

Name

Outstanding

Referral Date

▼ Household Members

This Client is not a member of any Households.

Provider \* FL505 - Homelessness And Housing Alliance (3349) Search My Provider Clear

Case Manager -Select-

Note Date \* 05 / 06 / 2026 📅 🔄 🗓

Note \* client attended hot lunch today and afterwards, met with case manager to complete One Way Home Assessment. Client was added to prioritization list and referred to Coordinated Entry. Client states he and his children are living in his vehicle in a church parking lot in Shalimar. Client lost his job due to having to miss several days because of not having child care.  
Goals: Find shelter for client and two children, ages 9 and 10. Obtain employment and find a new affordable rental as soon as possible. Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/ SHalimar area because of this.

Save Case Note Cancel

Action Step	Target Date	Status	Outcome
<span>Add Action Step</span>	No matches.		

Service Items for this Goal

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

Date Added	Notes
g stability 04/23/2026	<span>📄</span>
g stability 04/23/2026	<span>📄</span>
Showing 1-2 of 2	
Provider	Need Type
No matches.	
<span>Exit</span>	

Start Date

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Case Manager

Name

Outstanding

Referral Date

▼ Household Members

This Client is not a member of any Households.

Provider \* FL505 - Homelessness And Housing Alliance (3349) Search My Provider Clear

Case Manager -Select-

Note Date \* 05 / 06 / 2026 📅 🔄 🗓

Note \* client attended hot lunch today and afterwards, met with case manager to complete One Way Home Assessment. Client was added to prioritization list and referred to Coordinated Entry. Client states he and his children are living in his vehicle in a church parking lot in Shalimar. Client lost his job due to having to miss several days because of not having child care.  
Goals: Find shelter for client and two children, ages 9 and 10. Obtain employment and find a new affordable rental as soon as possible. Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/ SHalimar area because of this.

Save Case Note Cancel

Action Step	Target Date	Status	Outcome
<span>Add Action Step</span>	No matches.		

Service Items for this Goal

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

Date Added	Notes
g stability 04/23/2026	<span>📄</span>
g stability 04/23/2026	<span>📄</span>
Showing 1-2 of 2	
Provider	Need Type
No matches.	
<span>Exit</span>	

**Household Members**

This Client is not a member of any Households.

**Provider \*** FL505 - Homelessness And Housing Alliance (3349) Search My Provider Clear

**Case Manager** -Select-

**Note Date \*** 05 / 06 / 2026 Calendar Refresh

**Note \*** client attended hot lunch today and afterwards, met with case manager to complete One Way Home Assessment. Client was added to prioritization list and referred to Coordinated Entry. Client states he and his children are living in his vehicle in a church parking lot in Shalimar. Client lost his job due to having to miss several days because of not having child care.  
Goals: Find shelter for client and two children, ages 9 and 10. Obtain employment and find a new affordable rental as soon as possible. Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/ SHalimar area because of this.

Save Case Note Cancel

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
No matches.				

**Household Members**

This Client is not a member of any Households.

**Provider \*** FL505 - Homelessness And Housing Alliance (3349) Search My Provider Clear

**Case Manager** -Select-

**Note Date \*** 05 / 06 / 2026 Calendar Refresh

**Note \*** client attended hot lunch today and afterwards, met with case manager to complete One Way Home Assessment. Client was added to prioritization list and referred to Coordinated Entry. Client states he and his children are living in his vehicle in a church parking lot in Shalimar. Client lost his job due to having to miss several days because of not having child care.  
Goals: Find shelter for client and two children, ages 9 and 10. Obtain employment and find a new affordable rental as soon as possible. Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/ SHalimar area because of this.

Save Case Note Cancel

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
No matches.				

**Case Note - (23) Rizzo, Frank**

▼ Household Members

This Client is not a member of any Households.

Provider \* FL505 - Homelessness And Housing Alliance (3349) Search My Provider Clear

Case Manager -Select- ▼

Note Date \* 05 / 06 / 2026 📅 🔄 🗓️

Note \* client attended hot lunch today and afterwards, met with case manager to complete One Way Home Assessment. Client was added to prioritization list and referred to Coordinated Entry. Client states he and his children are living in his vehicle in a church parking lot in Shalimar. Client lost his job due to having to miss several days because of not having child care.  
Goals: Find shelter for client and two children, ages 9 and 10. Obtain employment and find a new affordable rental as soon as possible. Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/ SHalimar area because of this.

Save Case Note Cancel

Action Step	Target Date	Status	Outcome
<span>Add Action Step</span>	No matches.		

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
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**Case Note - (23) Rizzo, Frank**

▼ Household Members

This Client is not a member of any Households.

Provider \* FL505 - Homelessness And Housing Alliance (3349) Search My Provider Clear

Case Manager -Select- ▼

Note Date \* 05 / 06 / 2026 📅 🔄 🗓️

Note \* client attended hot lunch today and afterwards, met with case manager to complete One Way Home Assessment. Client was added to prioritization list and referred to Coordinated Entry. Client states he and his children are living in his vehicle in a church parking lot in Shalimar. Client lost his job due to having to miss several days because of not having child care.  
Goals: Find shelter for client and two children, ages 9 and 10. Obtain employment and find a new affordable rental as soon as possible. Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/ SHalimar area because of this.

Save Case Note Cancel

Action Step	Target Date	Status	Outcome
<span>Add Action Step</span>	No matches.		

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
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### Case Note - (23) Rizzo, Frank

**Household Members**

This Client is not a member of any Households.

Provider *	FL505 - Homelessness And Housing Alliance (3349)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Case Manager	-Select-	
Note Date *	05 / 06 / 2026	<input type="button" value="Calendar"/> <input type="button" value="Refresh"/> <input type="button" value="Save"/>
Note *	<p>client attended hot lunch today and afterwards, met with case manager to complete One Way Home Assessment. Client was added to prioritization list and referred to Coordinated Entry. Client states he and his children are living in his vehicle in a church parking lot in Shalimar. Client lost his job due to having to miss several days because of not having child care.</p> <p>Goals: Find shelter for client and two children, ages 9 and 10. Obtain employment and find a new affordable rental as soon as possible. Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/ SHalimar area because of this.</p>	

### Case Note - (23) Rizzo, Frank

**Household Members**

This Client is not a member of any Households.

Provider *	FL505 - Homelessness And Housing Alliance (3349)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Case Manager	-Select-	
Note Date *	05 / 06 / 2026	<input type="button" value="Calendar"/> <input type="button" value="Refresh"/> <input type="button" value="Save"/>
Note *	<p>client attended hot lunch today and afterwards, met with case manager to complete One Way Home Assessment. Client was added to prioritization list and referred to Coordinated Entry. Client states he and his children are living in his vehicle in a church parking lot in Shalimar. Client lost his job due to having to miss several days because of not having child care.</p> <p>Goals: Find shelter for client and two children, ages 9 and 10. Obtain employment and find a new affordable rental as soon as possible. Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/ SHalimar area because of this.</p>	

## 11 Click Save Case Note.

This Client is not a member of any Households.

Provider\* FL505 - Homelessness And Housing Alliance (3349) Search My Provider Clear

Case Manager -Select-

Note Date\* 05 / 06 / 2026

Note \*

Barriers: Client has the recent eviction on his record and a low credit score.

Client will work on getting documentation together for himself and children and meet with case manager again next week to apply for SNAP and Medicaid. Client was not accepted into shelter at this time, case manager will contact partner agencies to check availability of Challenge funding for a possible hotel stay.

Client was given information about the school district homeless liason and will be contacting them to see if they can assist as well.

Save Case Note Cancel

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

## 12 One one note is added under a goal, you can add another note under the same goal and tell their story or note progress, etc. This helps communicate with other agencies and keep track of client progress.

Provider	Case Manager	User Creating	Note Date	Note
FL505 - Homelessness And Housing Alliance	Mariah Reynolds		05/06/2026	client attended hot lunch today and afterwards, met with case manager to complete One Way Home Assessment. Client was added to prioritization list and referred to Coordinated Entry. Client states he and his children are living in his vehicle in a church parking lot in Shalimar. Client lost his job due to having to miss several days because of not having child care. Goals: Find shelter for client and two children, ages 9 and 10. Obtain employment and find a new affordable rental as soon as possible. Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/SHALIMAR area because of this. Barriers: Client has the recent eviction on his record and a low credit score.  Client will work on getting documentation together for himself and children and meet with case manager again next week to apply for SNAP and Medicaid. Client was not accepted into shelter at this time, case manager will contact partner agencies to check availability of Challenge funding for a possible hotel stay.  Client was given information about the school district homeless liason and will be contacting them to see if they can assist as well.

Add Case Note Showing 1-1 of 1

Action Step	Target Date	Status	Outcome
Add Action Step	No matches.		

Service Items for this Goal

### 13 Enter note details.

The screenshot shows a 'Case Note' modal window for 'Case Note - (23) Rizzo, Frank'. The form includes the following fields:

- Household Members:** A dropdown menu with the text 'This Client is not a member of any Households.'
- Provider \*:** 'FL505 - Homelessness And Housing Alliance (3349)' with 'Search', 'My Provider', and 'Clear' buttons.
- Case Manager:** '-Select-' dropdown.
- Note Date \*:** '05 / 06 / 2026' with calendar and refresh icons.
- Note \*:** A large text area with an orange circle highlighting it.

Buttons at the bottom of the modal are 'Save Case Note' and 'Cancel'. Below the modal, a preview of the note text is visible: 'Client was given information about the school district homeless liason and will be contacting them to see if they can assist as well.'

### 14 Click Save Case Note.

This screenshot shows the same 'Case Note' modal window, but with the 'Save Case Note' button highlighted by an orange circle. The 'Note \*' field now contains the text: 'Case manager completed Challenge request for 7 nights of hotel stay, pending approval from HHA. Client will be accepted into family shelter after the week in hotel, a space will be available then.'

Below the modal, the 'Action Steps Planned' section is visible, showing a table with columns for 'Action Step', 'Target Date', 'Status', and 'Outcome'. The table currently contains 'No matches.'

15

You can add a Case Note under the same goal even if you are from another agency working with the same client.

Provider	Case Manager	User Creating	Note Date	Note
FL505 - Homelessness And Housing Alliance		Mariah Reynolds	05/06/2026	Case manager completed Challenge request for 7 nights of hotel stay, pending approval from HHA. Client will be accepted into family shelter after the week in hotel, a space will be available then.
FL505 - Homelessness And Housing Alliance		Mariah Reynolds	05/06/2026	client attended hot lunch today and afterwards, met with case manager to complete One Way Home Assessment. Client was added to prioritization list and referred to Coordinated Entry. Client states he and his children are living in his vehicle in a church parking lot in Shalimar. Client lost his job due to having to miss several days because of not having child care. Goals: Find shelter for client and two children, ages 9 and 10. Obtain employment and find a new affordable rental as soon as possible. Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/ SHalimar area because of this. Barriers: Client has the recent eviction on his record and a low credit score. Client will work on getting documentation together for himself and children and meet with case manager again next week to apply for SNAP and Medicaid. Client was not accepted into shelter at this time, case manager will contact partner agencies to check availability of Challenge funding for a possible hotel stay. Client was given information about the school district homeless liason and will be contacting them to see if they can assist as well.

**Add Case Note** Showing 1-2 of 2

**Action Steps Planned**

Action Step	Target Date	Status	Outcome
No matches.			

**Add Action Step**

16

Search for your agency in Provider Search

**Provider Search** Processing...

**Provider Search**  
Search for Providers by using keywords from the Provider Name or Description.

Search  **Show Advanced Options**

**Search** **Clear**

**Provider Number**  
Enter or scan a Provider ID number to search for that Provider.

Provider ID #  **Submit**

**Provider Search Results**

# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Provider	Level	Phone	Location	Last Updated
Loading...				

**Exit**

**Provider Search**

Search for Providers by using keywords from the Provider Name or Description.

Search  Show Advanced Options

Search Clear

**Provider Number**

Enter or scan a Provider ID number to search for that Provider.

Provider ID #  Submit

**Provider Search Results**

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider	Level	Phone	Location	Last Updated																							
FL505 - Abundant Life Ministries - Hope House, Inc. [Agency-Level] (10316)	Level 3	850-362-7426	Unknown	12/04/2024																							
FL505 - Abundant Life Ministries - Hope House, Inc. - Permanent Supportive Housing (PSH) (10322)	Level 4	386-313-6381	Bunnell, FL 32110	03/23/2026																							
FL505 - Ascension Sacred Heart Emerald Coast (9730)	Level 3	850-278-3546	Miramar Beach, FL 32550	02/16/2023																							
FL505 - ASHEC - MyGulfCare SDOH (SSO) (9731)	Level 4	850-278-3546	Miramar Beach, FL 32550	02/16/2023																							
FL505 - Breaking Thru Ministry (10034)	Level 4	850-951-1800	Defuniak Springs, FL 32433	06/26/2024																							
FL505 - Bridgeway Center - (DO NOT ENTER DATA) [Agency-Level] (3400)	Level 3	850-659-3190	Fort Walton Beach, FL 32548	07/05/2023																							
FL505 - Bridgeway Center - Independent Living (PSH) (CoC) (9741)	Level 4	Unknown	Fort Walton Beach, FL 32548	01/10/2025																							
FL505 - Caring & Sharing - Challenge Grant (SSO) (10487)	Level 4	850-267-2866	Santa Rosa Beach, FL 32459	07/29/2025																							

17 You can do this by searching your agency name to show who added the note.

**Provider Number**

Enter or scan a Provider ID number to search for that Provider.

Provider ID #  Submit

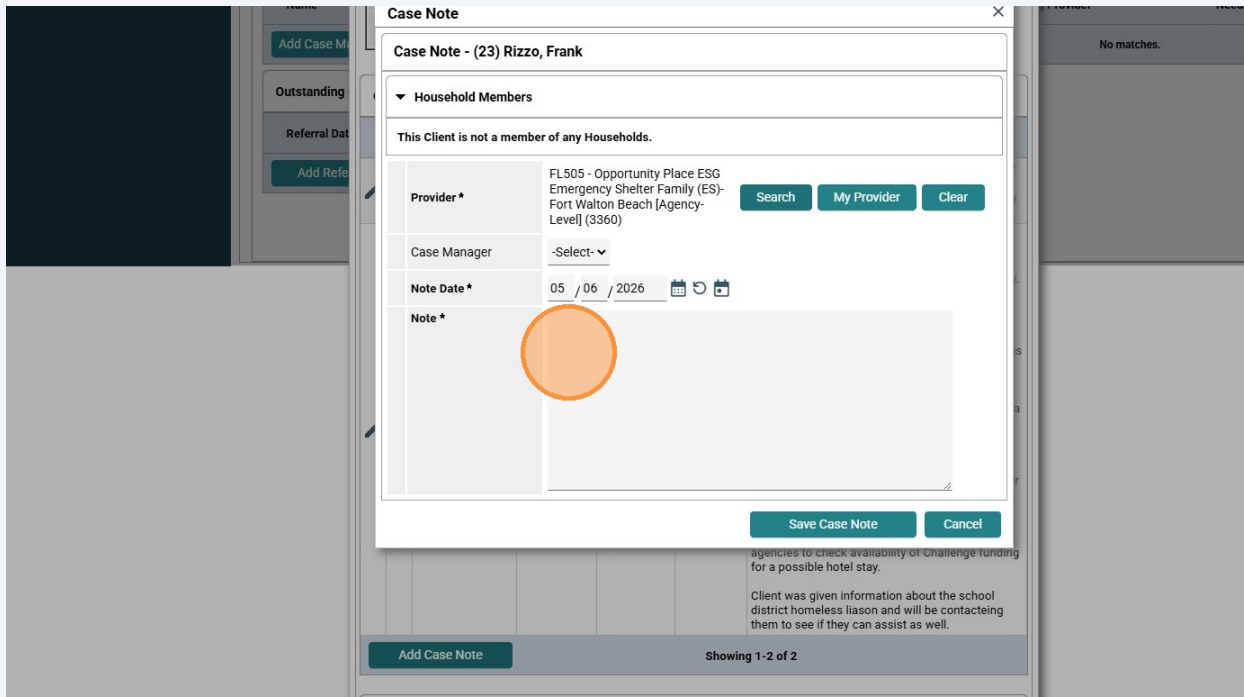
**Provider Search Results**

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider	Level	Phone	Location	Last Updated																							
FL505 - Opportunity Place - Challenge Grant (SSO) (10308)	Level 4	850-659-3190	Fort Walton Beach, FL 32548	11/05/2024																							
FL505 - Opportunity Place ESG Emergency Shelter Family (ES)- Fort Walton Beach [Agency-Level] (3360)	Level 3	850-659-3190	Fort Walton Beach, FL 32548	02/16/2023																							
FL505 - Opportunity Place - Unsheltered Challenge Grant (SSO) (10426)	Level 4	850-659-3190	Fort Walton Beach, FL 32548	09/12/2025																							
HistoricalFL505 - Opportunity Place (SO) (3743)	Level 4	850-659-3190	Fort Walton Beach, FL 32548	02/16/2023																							
zHistoricFL505 - Opportunity Place - Emergency Shelter (ES) (ESG-CV) (4726)	Level 4	850-659-3190	Fort Walton Beach, FL 32548	02/16/2023																							
zHistoricFL505 - Opportunity Place - Homeless Prevention (HP) (ESG-CV) (5591)	Level 4	Unknown	Fort Walton Beach, FL 32548	02/16/2023																							
zHistoricFL505 - Opportunity Place - Rapid Rehousing (RRH) (ESG-CV) (5550)	Level 4	850-659-3190	Fort Walton Beach, FL 32548	02/16/2023																							
ZZZ-<(RETIRED)FL-505 Opportunity Place Homeless Prevention Grant(RETIRED) (3403)	Level 4	850-659-3190	Fort Walton Beach, FL 32548	02/16/2023																							
ZZZ-<(RETIRED)FL-505 Opportunity Place Inc. Challenge Grant 2016 (RRH)(RETIRED) (3787)	Level 4	850-659-3190	Fort Walton Beach, FL 32548	02/16/2023																							

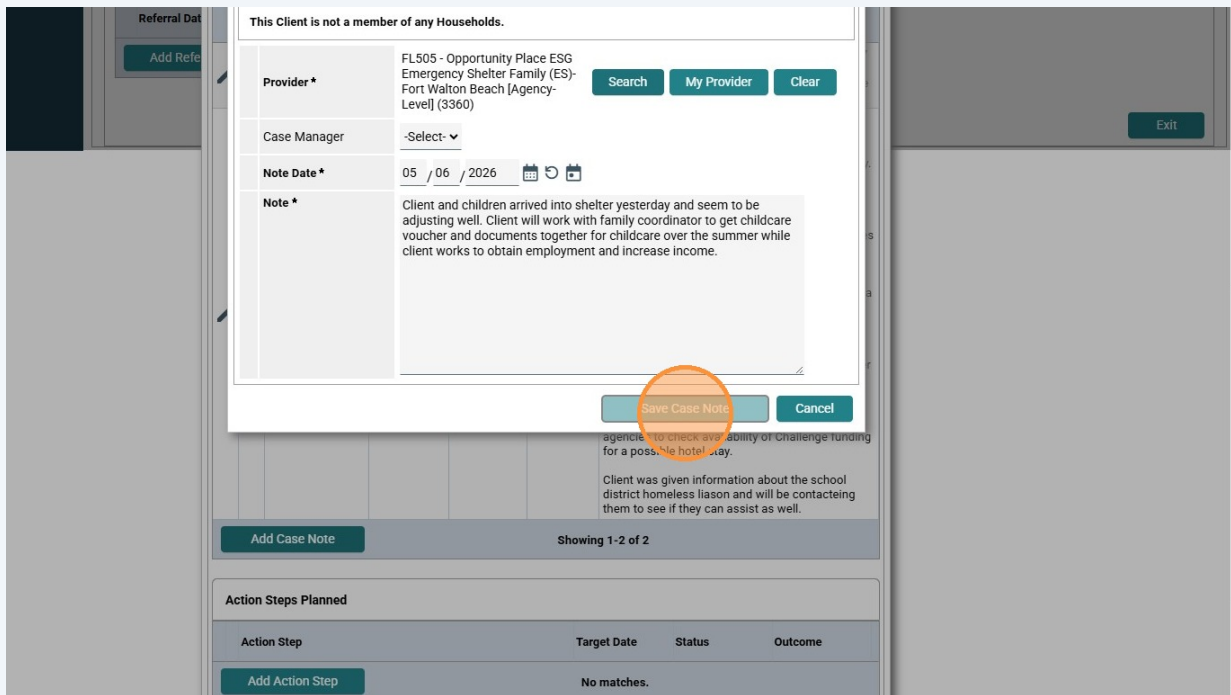
Showing 1-9 of 9

Exit

18 Enter a note regarding the client.



19 Click Save Case Note.



## Action Step Tracking

20

Click Add Action Step, this is optional but helpful if you are working with a client to track progress.

The screenshot shows a form for adding an action step. The 'Overall Status' dropdown menu is highlighted with an orange circle. The form contains the following fields and controls:

- Provider \***: FL505 - Homelessness And Housing Alliance (3349) [Search] [My Provider] [Clear]
- Date Action Step was set \***: 05 / 06 / 2026 [Calendar] [Refresh] [Clear]
- Action Step \***: A| [Text Area]
- Target Date**: [Calendar] [Refresh] [Clear]
- Overall Status \***: -Select- [Dropdown]
- If Closed, Outcome**: -Select- [Dropdown] [Calendar] [Refresh] [Clear]
- Projected Follow Up Date**: [Calendar] [Refresh] [Clear]
- Follow Up User**: FL505 - Homelessness And Housing Alliance (3349) [Search] [My Provider] [Clear]
- Follow Up Made**: -Select- [Dropdown]
- Completed Follow Up Date**: [Calendar] [Refresh] [Clear]
- Outcome at Follow Up**: -Select- [Dropdown]

Buttons at the bottom: [Add Service] [Add Multiple Services] [No matches.] [Print] [Save Goal] [Save & Exit] [Exit]

21

Set the Overall Status to In Progress.

The screenshot shows the same form as in step 20, but with the 'Overall Status' dropdown menu set to 'In Progress'. The 'Overall Status' dropdown is highlighted with an orange circle. The form contains the following fields and controls:

- Household Members**: This Client is not a member of any Households.
- Provider \***: FL505 - Homelessness And Housing Alliance (3349) [Search] [My Provider] [Clear]
- Date Action Step was set \***: 05 / 06 / 2026 [Calendar] [Refresh] [Clear]
- Action Step \***: Apply for [Text Area]
- Target Date**: [Calendar] [Refresh] [Clear]
- Overall Status \***: In Progress [Dropdown]
- If Closed, Outcome**: -Select- [Dropdown] [Calendar] [Refresh] [Clear]
- Projected Follow Up Date**: [Calendar] [Refresh] [Clear]
- Follow Up User**: FL505 - Homelessness And Housing Alliance (3349) [Search] [My Provider] [Clear]
- Follow Up Made**: -Select- [Dropdown]
- Completed Follow Up Date**: [Calendar] [Refresh] [Clear]
- Outcome at Follow Up**: -Select- [Dropdown]

Buttons at the bottom: [Save Action Step] [Cancel]

22 You can add a Target Date for the action step.

**Action Step**

Action Step - (23) Rizzo, Frank

Household Members

This Client is not a member of any Households.

Provider *	FL505 - Homelessness And Housing Alliance (3349)	Search	My Provider	Clear
Date Action Step was set *	05 / 06 / 2026	Calendar	Refresh	Calendar
Action Step *	Apply for			
Target Date	/ /	Calendar	Refresh	Calendar
Overall Status *	In Progress			
If Closed, Outcome	-Select-	/ /	Calendar	Refresh
Projected Follow Up Date	/ /	Calendar	Refresh	Calendar
Follow Up User	FL505 - Homelessness And Housing Alliance (3349)	Search	My Provider	Clear
	-Select-			
Follow Up Made	-Select-			
Completed Follow Up Date	/ /	Calendar	Refresh	Calendar
Outcome at Follow Up	-Select-			

23 Click Save Action Step.

This Client is not a member of any Households.

Provider *	FL505 - Homelessness And Housing Alliance (3349)	Search	My Provider	Clear
Date Action Step was set *	05 / 06 / 2026	Calendar	Refresh	Calendar
Action Step *	Apply for			
Target Date	05 / 30 / 2026	Calendar	Refresh	Calendar
Overall Status *	In Progress			
If Closed, Outcome	-Select-	/ /	Calendar	Refresh
Projected Follow Up Date	/ /	Calendar	Refresh	Calendar
Follow Up User	FL505 - Homelessness And Housing Alliance (3349)	Search	My Provider	Clear
	-Select-			
Follow Up Made	-Select-			
Completed Follow Up Date	/ /	Calendar	Refresh	Calendar
Outcome at Follow Up	-Select-			

Save Action Step Cancel

Print Save Goal Save & Exit Exit

**24** Click Save & Exit to close the Goal window. You are done!

The screenshot shows a goal management interface with the following sections:

- Case Information:** FL505 - Homelessness And Housing Alliance, Mariah Reynolds, 05/06/2026. Description: Children attend school in FWB and client states he would like to stay in the FWB/Mary Esther/ SHalimar area because of this. Barriers: Client has the recent eviction on his record and a low credit score.
- Action Steps Planned:** A table with columns: Action Step, Target Date, Status, Outcome. One entry: Apply for (05/30/2026, In Progress).
- Service Items for this Goal:** A table with columns: Date Set, Created By, Need Type, Need Status, Outcome of Need. Status: No matches.
- Buttons:** Print, Save Goal, **Save & Exit** (circled in orange), Exit.

## CLIENT NOTES

**25** For shorter notes, you can add them under the Client Profile tab.

The screenshot shows the WellSky Client Profile page for Frank Rizzo. The 'Client Profile' tab is circled in orange. The page includes a sidebar with navigation options and a main content area with the following sections:

- Client Information:** Summary, Client Profile (circled in orange), Households, ROI, Entry / Exit, Case Managers, Case Plans.
- Client Details:** Name: Rizzo, Frank; Social Security; Date of Birth; U.S. Military Veteran?; Race and Ethnicity; Sex.
- Release of Information:** Table with columns: Provider, Permission, Start Date, End Date. Status: No matches.
- Entry/Exits:** Table with columns: Program, Type, Project Start Date. Status: No matches.
- Households:** Section for managing household information.
- Services:** Section for managing service information.

26 Click Add New Client Note.

The screenshot shows a software interface with a table of Client Notes. The table has columns for Start Date, Call ID, Call Time, Call Type, Call Status, and Follow Up Needed. Below the table, there is a section titled 'Client Notes' with a table of notes. The 'Add New Client Note' button is circled in orange.

Start Date	Call ID	Call Time	Call Type	Call Status	Follow Up Needed
No matches.					

Provider	Note Date	Note Preview
FL505 - Homelessness And Housing Alliance	04/23/2026	client picked up the bc that was ordere...
FL505 - Homelessness And Housing Alliance	04/23/2026	left id at shelter, it is at front desk
FL505 - Homelessness And Housing Alliance	04/23/2026	client left id on the copier when we...
FL505 - Homelessness And Housing Alliance	04/23/2026	client stooped by to check status and l...

Buttons: Add New Client Note (circled), Print

Showing 1-4 of 4

27 Enter a client note that will pop up the next time the profile is open.

The screenshot shows a software interface with a 'Note' dialog box open. The dialog box is titled 'Add a New Client Note - (23) Rizzo, Frank' and has a 'Note Date' field set to 05 / 06 / 2026. The 'Notes' field is empty and has a large orange circle. The background shows a table of Client Notes.

Dialog Box: Note

Add a New Client Note - (23) Rizzo, Frank

Note Date \* 05 / 06 / 2026

Notes

Buttons: Save, Cancel












28

Click Save to finalize the client note.

Call Records

Start Date	Call ID	Call Time	Call Type	Call Status	Follow Up Needed	Call Notes
No matches.						

Client Notes

Provider	Note Date	Note Preview	Full Note
  FL505 - Homelessness And Housing Alliance	04/23/2026	client picked up the bc that was ordere...	
  FL505 - Homelessness And Housing Alliance	04/23/2026	left id at shelter, it is at front desk	
  FL505 - Homelessness And Housing Alliance	04/23/2026	client left id on the copier when we we...	
  FL505 - Homelessness And Housing Alliance	04/23/2026	client stooped by to check status and i...	

[Add New Client Note](#) [Print](#) Showing 1-4 of 4

File Attachments

Date Added	Name	Description	Type	Provider	Added From
<a href="#">Add New File Attachment</a> <span>No matches.</span>					

Incidents

Start Date	End Date	Incident	Incident Code	Provider	Ban	Site	Staff
<a href="#">Add New Incident</a> <span>No matches.</span>							