

Writing a Housing Support Case Note

Supplemental services must always have a corresponding case note.

MN Statute 256I and the Hennepin County Housing Support Agreement requires all vendors providing supplemental services to maintain case notes with date and description of services provided to individual recipients. For more information, see the [Housing Support Agreement – Community](#) and [Housing Support Agreement – Group](#) documents.

Purpose of Case Notes

- Document services that address client needs as outlined in Section 4 of the Professional Statement of Need (PSN) ([DHS-7122](#)).
- Demonstrate use of best practices (e.g., harm reduction, motivational interviewing, person-centered care).
- Track changes in risk levels (suicide, homicide, overdose).
- Serve as proof of service delivery and are used for:
 - Payment approval
 - Performance evaluations
 - Monitoring and complaint investigations

Required Elements in a Case Note

Part 1: Encounter Details	Part 2: Worker Actions	Part 3: Client Actions
<ul style="list-style-type: none">• Client and worker names• Date and time (start/end) of the encounter• Type/location (in-person, phone, Zoom, email, text)• Date the note was written	<ul style="list-style-type: none">• Needs from PSN addressed• Actions taken by the worker• Results of those actions• Next steps for the worker	<ul style="list-style-type: none">• Client actions observed• Results of those actions• Client's next steps• Observations impacting client's progress

Tips for Writing Effective Case Notes

- Complete notes within 5 days of the encounter; explain any delays.
- Start sentences with action verbs.
- Include names and actions of others present.

Suggested Verbs: Advised, Advocated, Arranged, Assisted, Attended, Coordinated, Facilitated, Informed, Monitored, Referred, Scheduled, etc.

Sample Case Note

Client Name: John D.

Worker Name: Case Manager

Date of Encounter: September 2, 2025

Start Time: 10:00 AM

End Time: 10:45 AM

Type of Encounter: In-person at client's residence

Date Case Note Written: September 2, 2025

Needs Addressed (from PSN):

- Assistance with maintaining housing
- Support with managing mental health symptoms

Worker Actions:

- **Assessed** John's current housing situation and reviewed his lease agreement to ensure compliance.
- **Discussed** recent challenges John has faced with his landlord regarding noise complaints.
- **Provided** education on tenant rights and responsibilities.
- **Referred** John to Legal Aid for further support with housing-related concerns.
- **Scheduled** a follow-up appointment with John's mental health provider to address increased anxiety symptoms.

Results of Worker's Actions:

- John expressed relief after understanding his rights and agreed to contact Legal Aid.
- He confirmed the follow-up appointment with his provider and stated he felt supported in managing his symptoms.

Next Steps for Worker:

- **Follow up** with John in one week to check on progress with Legal Aid and mental health appointment.
- **Coordinate** with housing case manager to monitor ongoing landlord concerns.

Client Actions Observed:

- John actively participated in the discussion and took notes.
- He made a phone call to Legal Aid during the visit and scheduled an intake appointment.

Results of Client's Actions:

- John appeared more confident and less anxious after taking proactive steps.

Client's Next Steps:

- Attend Legal Aid intake appointment on September 5.
- Attend mental health provider appointment on September 6.

Observations Impacting Progress:

- John's anxiety appears to be increasing due to housing instability, but he is demonstrating motivation to address these issues with support.