



Housing Stabilization Documentation

SIMPLIFYING AND SUMMARIZING.

Documentation Format

- ▶ Date of Service
- ▶ Start time and End Time, Total Units, HS or HT
- ▶ In person or on client's behalf/remote
- ▶ Service Provided
- ▶ Service Description (summary of services that reflect service provided)
- ▶ Signature

Example

▶ 3/9/2021

10:00 a.m.-----11:00 a.m. (1 hour) HS

In person service-Direct

Continued training on being a good tenant, lease compliance, and household management. Worked with client on budgeting, lease review, and discussing behaviors and concerns that could cause issues in home; relapse, following conditions of probation, and following conditions or release.

Patrick Harrington- Executive Director

Example

▶ **3/9/2021**

10:00 a.m.-----11:00 a.m. (1 hour) HS

In person service

Assistance with the housing recertification processes. Worked with client on completing CAF, contacting mental health provider, and setting up appointment to meet with therapist for ongoing care and submitting the Professional Statement of Need for signature. Contacted landlord to confirm time for lease renewal.

Patrick Harrington Executive Director

Example

▶ 3/9/2021

10:00 a.m.-----11:00 a.m. (1 hour) HS

*On behalf of person service

***Working with property manager or landlord to promote housing retention.**

Whelan properties contacted case manager regarding client and a complaint about smoking in the apartment. Staff spoke with Whelan regarding these concerns and Whelan asked to meet with client to discuss concern. Staff arranged with client a time to meet next Tuesday at 1 p.m. to address them with client and property management company.

Patrick Harrington Executive Director

Example

▶ 3/9/2021

10:00 a.m.-----11:00 a.m. (1 hour) HS

In person service

Developing, updating and modifying the housing support and crisis/safety plan.

Met with client in home, reviewed crisis safety plan, updated resources with client and client identified that ongoing mental health care could be helpful. Staff will work with client to identify a therapist and assist client in setting up first appointment. A copy of updated safety plan is in client file and a copy was provided to the client. Staff will review plan again at next appointment.

Patrick Harrington Executive Director



▶ **3/9/2021**

10:00 a.m.-----11:45 a.m. (1.75 hours) HS

In person service

Arranging for assistive technology. Worked with client on providing a new calendar and developing the calendar to meet client needs. Client identified appointments and reminders that were important in keeping in order to increase sustainability in housing; all mental health appointments, outpatient appointments, and times and dates of food shelf. Staff worked with client on adding all case management appointment dates and times to the calendar and assisted in setting up transportation with the county, and public transit for week.

Patrick Harrington Executive Director

Reducing the Narrative

Creating a brief and concise summary can be challenging. Use the following litmus test to help you decide what to include and what you could leave out of your documentation.

Reducing the Narrative

- ▶ **Is the information necessary to describe the Sustaining or Transition service that was provided?**
- ▶ **Is the information necessary to protect the client, the staff member or the agency?**
- ▶ **Does the information assist the client in keeping housing or transitioning from or into housing?**
- ▶ **Is the information pertinent to the ongoing work I will be doing with the client?**

Documentation Challenge to Staff

- ▶ Your documentation should not need exceed a full paragraph. If it begins to exceed this, you may want to review and condense the case note. Don't overthink the scenario, provide the essential details.
- ▶ A Housing Stabilization and/or Transition case note should not take more than 5-10 minutes to construct.
- ▶ Case documentation should not exceed more than 30-45 minutes a day if you follow these guidelines.

Questions/Comments/Concerns



**KEEP
CALM
AND
STAY
COOL**