

Attachment I

Sample Note Template &

Sample Notes

PSHA Service Provider Note	Name _____ ID number __ (if using HMIS, the ID will be embedded) _ Date of service _____ Time of service __ (optional) _____
Situation	The basics: Who, where Subjective: Participants' presentation Objective: The presenting situation at the beginning of the engagement, if there was a goal heading into the meeting
Intervention & Response	What did you do and how What goal was focused on (can use numbers or summarize the goal) The participant's response to the intervention
Follow Up	What is the plan moving forward. Who is responsible.

In Person Meeting	Name _____ ID number __ (if using HMIS, the ID will be embedded) _ Date of service _____ Time of service __ (optional) _____
Situation	TS missed our last appointment so I stopped by the shelter to see if we could connect. He was there, apologized for missing our last meeting and not responding to my texts, and we met in the lobby.
Intervention & Response	TS introduced me to a couple of his friends and engaged in conversation about the super bowl. TS signed the document needed to submit his application. We talked about preparing a letter for property managers to talk through his criminal record. He said he wants to try this on his own first and then we can look at it together.
Follow Up	I'll submit the VSHA application today. TS works on letter re charges. Plan to meet next Tuesday at 11 at shelter.

CM Note	Name _____ ID number _____ Date of service _____ Time of service _____
Situation	KJ and I met at their apartment. Their partner was in a different room and did not join our meeting. KJ initially seemed to have forgotten I was coming by and seemed caught off guard and more disorganized than usual. The unit appeared messy, with clothes, papers, dirty dishes and other items strewn throughout. They made some space in the kitchen and gathered paperwork from their bedroom so we could start reviewing their budget.
Intervention / Response	Budget – Goal #2 I expressed appreciation for their increased organization with the bills they brought to our budget meeting, noting this as a strength. We used the standard budget template, which highlighted a significant deficit this month due to their medical bill from last week. I held space and reflected to validate this challenge. They ended up setting a tentative goal to reduce spending on recreational substances and eating out this month. We both wondered if there was a way to have their heat bill reduced. We reflected on their first couple of months of having their rent portion be directly deposited from their bank. KJ expressed some relief but also noted the perceived impact of having more limited spending money. Overall, KJ seems to be engaged in the budget process, actively participating in discussions and generating solutions. Housing Stability – Goal #1 We talked a bit about pets and KJ shared about their favorite pet from childhood. This conversation provided an opportunity to address concerns about apartment upkeep. Initially, KJ seemed to deflect these concerns, but when linked to their lease agreement, they identified a few ideas for maintaining cleanliness. KJ spoke quietly and quickly when they identified that their partner has been a problem. They did not respond to a couple follow-up questions about this and appeared anxious.
Follow Up	KJ – Will clean up the food items and dirty dishes within the next two days. I will explore options to reduce heat expenses. Next meeting is planned at 10am next Wednesday at the library to give us more privacy from their partner. I'll send a text reminder.

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Situation	Service provider, JF, approached SP sitting on the corner outside of Mr. Mikes Pizza for a planned 2 pm meeting to assist him in making his GA rent payment during the first week of the month. SP was sitting with 2 other individuals. SP appeared to be intoxicated by his slurred speech and several empty beer cans beside him.
Intervention & Response	Goal #2 Maintain Tenant Responsibilities JF greeted SP, who expressed that he was "feeling good" because someone had given him a pack of beer earlier in the afternoon. JF asked SP if he preferred privacy for their meeting. SP declined, explaining that the people sitting with him were "like family" and could remain present. SP recalled that the meeting was intended to discuss paying his rent at ESD. He stated, "that is not going to happen today," citing dizziness due to hunger, which he experiences frequently. JF and SP explored other strategies to better take the step of getting to ESD. SP shared that he tended to feel less dizzy in the morning and that he typically took a bus to this location by 10am daily. It was decided to postpone the ESD trip until tomorrow when JF would pick up SP from his home, stop at Feeding Chittenden for breakfast, head to ESD, then get back to the corner by mid-morning. JF also asked if SP felt the need to see a doctor regarding his dizziness, but SP declined. JF offered SP a granola bar or mixed nuts from his outreach bag, but SP declined.
Follow Up	JF will pick up SP at 9:30 from his home on 9/7 to complete his GA paperwork for his rent payment. Plan to discuss dizziness and hunger more. Update Housing Support service plan.

PSHA Service Provider Note	Name _____ ID number _____ Date of service _____
Situation	I knocked on LR's door many times for our scheduled meeting with no response. I called and texted and then heard him yell through the door that he was coming. LR opened the door looking like he'd just woken up and welcomed me in. We met in the living room.
Intervention & Response	Goal #2 Sustain Housing Our intention for the meeting was to explore job postings but LR presented as sad and distant. We explored how he is feeling, and he shared that overall, he has been depressed. He talked for some time about this and feeling lonely and "worthless." I brought up some of the people he'd identified on his crisis plan and he liked the idea of reaching out to his cousin more often and wrote the idea on a Post-It note for his fridge. He shared that he missed his therapy session yesterday and worried that his weekly time would not be saved. In our meeting he reached out to his therapist to confirm. He seemed to feel a bit better throughout the meeting, speaking a bit more clearly and looking me in the eyes more. When asked he said he did feel a bit better and that it has just been hard to go multiple days in a row without talking with anyone. We created a small calendar for the next week about who he could reach out to each day. W – I will give him a call to check in Th – He will call his cousin F – I will give him a call to check in Sa – He will see if his neighbor is around Su – Cousin M – I'll text him a reminder to make his therapy appointment. We decided to put off looking at job postings until next week, but LR did express feeling like having a job that he wouldn't get fired from could help him feel better.
Follow Up	LR t reach out to his natural supports I will call tomorrow, Friday, and will text him on Monday. I will call Working Fields to see if they are currently supporting job seekers who want to work very part time. Meet next Tuesday at 2pm and revisit job search.