THE HOUSING SPECIALIST™

Housing Specialist Case Management & Documentation Toolkit

Organize caseloads • Write clear objective case notes
Manage deadlines and maintain accurate follow-up records

Professional Resource #19 • 6 Pages • Fillable • Printable • Free
Housing Specialist Hub → Working With Clients

Specialist Information

Housing Specialist Name: _____ **Date:** _____

Organization / Program:

_____

1. Case Management Essentials

Professional recordkeeping is a core responsibility. Good documentation protects clients, supports continuity, and demonstrates accountability.

- Case notes are written in the authorized system on the same day as the activity whenever possible
- Notes are factual, objective and free of personal opinions or judgmental language
- Sensitive information is recorded only when necessary and stored securely
- Deadlines and follow-up dates are visible and reviewed regularly
- Handoffs to colleagues include clear status and outstanding actions
- Escalations to supervisors are documented with the reason and date
- Client confidentiality is protected in all written and verbal communication
- Documentation standards of the employer are followed consistently

Key principle: If it is not documented, it is difficult to prove it happened — and difficult for a colleague to continue the work.

2. Objective Case Notes — Five-Part Framework

Use this structure to keep notes clear, useful and professional.

The Five Parts

1. Context — Who, when, how (client, date, method of contact)
2. Purpose — Why the contact occurred (scheduled follow-up, client request, landlord call, etc.)
3. Facts — What was said or observed (paraphrase accurately, avoid interpretation)
4. Action Taken — What you did during or immediately after the contact
5. Next Step — What will happen next, by whom, and by when

Practice Exercise (Fictional Scenario)

You spoke with a client by phone on Monday at 10:15 a.m. The client said the landlord still has not fixed a leaking ceiling that was reported two weeks ago. You advised the client to put the request in writing and offered to help draft a short message. You also noted that you will check whether the issue should be escalated. You agreed to call the client back on Wednesday.

Write a short objective case note using the five-part framework:

_____
_____
_____
_____
_____
_____

Self-check: Does your note contain only facts? Is the next step clear? Could a colleague pick up the case from this note alone?

3. Caseload Prioritization

Organize deadlines, next actions and follow-ups so urgent items are visible and nothing important is lost.

Weekly Priority Snapshot

Priority Level	Case / Task (use codes, not full names)	Deadline	Next Action
Urgent (today / tomorrow)			
High (this week)			
Standard (follow-up)			
Waiting on others			

Prioritization Tips

- Court dates, voucher expirations and confirmed move-in dates usually outrank routine follow-ups
- Items waiting on an external party still need a diary date so they are not forgotten
- Review the full caseload at least twice per week, not only the cases that call you
- When capacity is limited, escalate capacity concerns to your supervisor rather than silently dropping tasks

4. Documentation Quality Audit

Periodically review a sample of your own notes for accuracy, completeness and confidentiality.

Quality Checklist (review 3–5 recent notes)

- ■ Date and method of contact are clearly stated
- ■ Purpose of the contact is clear
- ■ Facts are separated from opinions or assumptions
- ■ Actions taken by the specialist are recorded
- ■ Next step, responsible person and timeframe are present
- ■ No unnecessary sensitive details are included
- ■ Language is professional and non-judgmental
- ■ Note would allow a colleague to continue the case without confusion
- ■ Employer-required fields or templates have been completed
- ■ Confidentiality rules have been respected

Notes on areas to improve:

_____

_____

_____

5. Handoff & Escalation Tracker

Coordinate unresolved issues with colleagues and supervisors so work does not stall when you are unavailable or when a case exceeds your role.

Handoff / Escalation Log

Date	Case Code	Issue	Handed To	Status / Outcome

Good Handoff Practice

- Summarize current status in 3–5 clear sentences
- List outstanding actions and any hard deadlines
- Identify what has already been tried
- Note any client communication preferences or sensitivities (without oversharing)
- Confirm the receiving colleague has accepted the handoff

6. Weekly Professional Review

End each week with a short structured review so patterns of delay or documentation gaps become visible early.

This Week's Review

Question	Response
How many cases required urgent action this week?	
Were any deadlines missed? If yes, what caused the miss?	
Did any case notes fall below the quality standard?	
Were handoffs or escalations completed cleanly?	
What one practice will I improve next week?	

Personal improvement commitment for next week:

_____

_____

Professional Safeguards

This toolkit is a working resource for Housing Specialists. It does not replace employer policies, official case-management systems or supervision requirements.

- Do not record full client names, addresses or other highly identifiable details on this working paper if it will leave the secure system.
- Use case codes or initials when practicing or when the form may be shared for training.
- Objective, timely documentation protects both the client and the professional.
- When capacity or complexity exceeds what you can manage safely, escalate early.