**CLOSE THE ASSESSMENT CASE IN I-SMART**

If there wasn't a treatment recommendation made of if a client will not follow through with their recommendation for treatment and the case will need to be closed. Make sure that all notes (Encounter and Misc.) have been posted in ISmart BEFORE you do all of this.

A. Misc. Note entered stating why the file is closed.
1. Left Hand menu bar, click on Notes
   Click on <u>Add New Miscellaneous Notes Record</u>
   (For more information on Miscellaneous Notes see section F)
2. In Note box state why the file is being closed.

B. Close out all open Tx Team Members (if applicable.)
1. Left hand menu, click on Treatment Team.
   (For more information on Treatment Team see Appendix B)

C. You need to close the case.
1. Go to the client's Activity List.
2. Click on <u>Review</u> of the Intake Screen.
3. At the Intake Transaction screen enter in today's date in the Close Case field and then click on the blue <u>Save and Close Case</u> hyperlink.
4. Click on "Save" and "Finish".

D. Give the paper file to your Supervisor for the review (if it's not been done already) and then they will send it to the file room to be closed and filed.
   a. Once the Director/Supervisor has reviewed the file and determined that the file is appropriate to be sent to the file room a Misc. Note will be posted into ISmart stating that the file has been sent to file room. Summary field will be labeled "Sending File". This information can also be included in the File Review Misc. Note.