DISCHARGE PROCEDURE

The purpose of the discharge module is to discharge a substance user or concerned person whose client status was admitted and to update the client's characteristic data. This would be done at the time the client completes treatment or when it has been determined that the client is no longer going to continue with treatment. Once the Discharge module has been created in the ISmart case you cannot continue on in that case, so if the client's comes back or the Discharge module was entered in error you will need to create a new case/episode in ISmart.

The component/counselor last assigned to the file is responsible for completing the discharge regardless of the client attending or not attending any sessions in that component.

The State will notify us if a client has not had any services in a 60 day period. ASAC has determined that if the client has not been seen for 30 days you MUST contact the client to determine if they are going to continue on with treatment. (The exception to this is Aftercare clients, they need to be seen at minimum every 45 days but you should really try to see them at least once every 30 days.)

1. Counselor will contact the client by phone with in 5 business days.
2. If you cannot get a hold of them by phone you will need to send a letter.
3. 10 business days from the date the letter was sent, if there has still not been any contact with the client, you need to close the file.
4. Document all these attempts in a Misc. Note.

- **First you need to obtain permission from your Director.**
  1. Notify your Director.
  2. Director must determine that the discharge is appropriate.
     a. Once approved, a Misc. Note needs to be entered into the ISmart file.
        i. Label the Summary field as "Discharge Authorization." Enter a quick note.
     b. OR the discharge authorization can be included in a Supervisor Review.

- **Residential clients** (with the exception of youth clients), need to contact the Billing Coordinator to set up time to meet with her so that client can:
  1. Give their new address
  2. Receive balance due

- **Remember that the Discharge is the LAST module** added to the client's Activity List. You should not be performing any Treatment Reviews after the Discharge Module is entered, the Discharge process will meet the needs of the last TPR. If for some reason you have a review that needs to be entered you need to do this before you enter the Discharge module.

- **These items *might* want to be reviewed** before you enter the Discharge Module.

1. Either read or print out the last Tx Review to refer to; the ASAM information in the Discharge module is from the Admission module and not from the latest Tx Review.
2. Take note of Number of arrests in Lifetime from the Admission Module Legal Screen, it is referenced in the Legal screen of the Discharge Module.

- **YOU MUST ENTER THE LAST ENCOUNTER NOTE FOR THE CLIENT BEFORE ENTERING THE DISCHARGE MODULE.** You do not have to have the DAP note portion of the Encounter note entered. You can go back and change the amount of minutes if necessary. But to successfully enter a Discharge you need to have the last Encounter Note entered into ISmart.

- **Hint:** You may want to start off with entering just the yellow fields in the Discharge module first, Save it and then go back and enter in the typed information like the ASAM or the Tx Summary screen. Since you cannot actually Save the Discharge module until all yellow required fields are entered it would be possible for you to lose your ASAM or Tx Summary information before you were able to save the module.

- Go to client's activity list.
  1. **End Program Enrollment.**
     a. Left menu bar, click on Program Enroll.
     b. Click on "Review" for the current Program Enrollment that the client is being discharged from.
     c. Go to End Date field and enter in the client's last date of service.
     d. In Termination Reason field select appropriate response from the drop down choices in the.
     e. Click on "Save" and then "Finish"

  2. **End Treatment Team entries.**
     a. Left menu bar click on Treatment Team.
     b. For each open treatment team entry, click on "Review" and enter in the last date of service as the End Date.
     c. For the Primary Care Staff, change the 'Primary Care Staff' question from a Yes to a No.
     d. REMEMBER- if you have a staff person listed due to DENYING them access to the file do NOT enter in the End Date, leave that field blank.
     e. Click on "Finish."

- **Enter the Discharge**. From the client's current ISmart case, left menu bar, click on Discharge.
  1. **Profile Screen.**
     a. Fill in 'Discharged' and 'Date of Last Contact' fields with the clients <u>DATE OF LAST SERVICE</u>. This date can be different than the date you are entering your Discharge module

b. Your name should go into the 'Discharge Staff' box. (Drop down box).
c. Place appropriate response in 'Reason' drop down box.
    i. Reason for discharge 25, 26 and 27 will have less yellow fields to fill in.
d. You do not need to fill in Discharge Referral and Disposition fields.
e. Place appropriate ASAM Criteria and Level of Risk for all categories. Fill in Comments too.
f. Click "Next"

2. **Legal Screen.**
a. For reason for discharge 25, 26 and 27, leave all fields blank.
b. For all other Discharge Reasons fill in all the yellow boxes and the remaining white boxes, fill them in to the best of your knowledge.

3. **Status Screen**
a. Fill in all yellow fields.
b. Click "Next"

4. **Substance Abuse Screen**
Note: For a Concerned Other you do not need to have any Substance fields filled in.
a. Fill in all yellow fields.
b. Fill in the Severity fields for the current substances.
c. For Reason for Discharge 25, 26 and 27 you will still need to fill out the Frequency and Method of Use for all substances listed, even though they are white fields.
d. Discharge Status: Treatment field should be filled in for all Discharge Reasons.
e. Was Family Member Involved in Treatment question needs to be filled out, regardless of Discharge Reason.
f. Did IDPH pay for any portion of this Tx- answer yes if the client was on the sliding fee scale.
g. Did Medicaid pay for any portion of this Tx- answer yes if the client has T19 and it paid for their services.
h. Click "Next"

5. **Tx Summary**
a. Fill in clients "Strengths and Needs"
b. Use the Recommendations box for:
    i. A brief synopsis of what is going on with the client.
    ii. What level of care you are recommending (if any.)
    iii. Were the items that needed to be addressed with the client taken care of?
    iv. Make note whether the client completed treatment or not. If they were here because of an OWI then make

note of that. (Note: remember that a client who does not complete all recommended services cannot have their 321j form sent to the DOT. See the 'IowaCode321j procedure' in your manual.)

v. Discharge letters: if any letters were sent out make note of who you sent it to and what you sent.

f. Click "Next".

6. Client Satisfaction Screen

a. These questions do not need to be filled in for Reason for Discharge 25, 26 and 27.

b. This is in the Clients Opinion. Ask the client what their opinion of our counseling was in each of the 5 categories. If the client has a comment you may type it in the Comments box, but it is not required.

c. Click "Save".

g. Click "Finish".

h. When you click on "Finish" a message appears on the screen asking if you want to close the case also. You should answer this with a NO.

7. Diagnosis Screen

a. There is a screen for Diagnosis, but we are not utilizing it at this time.

- **Finish up with the ISmart File.**

1. Take care of Discharge Letter.
   a. Discharge Letter will be sent to the client and any appropriate referral sources, if a valid release exist.
   b. Fill out Discharge Letter request and give to your secretary.
   c. If more then just a letter is requested then you can print the ASAM page and/or the Treatment Summary page from the Discharge Module. (Most times a letter is sufficient.)
   d. Place a copy of all documents sent in the client's paper file. This is a requirement in order for the file to be closed for the file room.
2. Make sure all progress notes were entered.
3. Make sure all final Misc. Notes are entered and the paper copy of the file is in order.
4. Close the ISmart case. (This is done at the Intake screen.)
   a. Click on Review of the Intake Screen.
   b. Fill in "Date Closed" with the client's date of last service.
   c. Click on "Save & Close Now".
   d. This episode is now closed. Should you need to re-open this episode for some reason in the future, contact your designated management team member. That person will be able to re-open the episode should they deem it necessary.
5. Make sure all materials are in the file. This includes letters, Apartment Checks and any other items created by ASAC that need to be in the paper file.

6. Then give to your Director for review.
7. The paper file needs to be sent to your Director to review within 5 working days of entering the Discharge Module.

- **Discharge Review**
  This is done by the Director/Supervisor. For more information on the Discharge review please see Section K of your manual.
  - Once the Director/Supervisor has reviewed the file and determined that the file is appropriate to be sent to the file room you may state in the Discharge Review Misc. Note that the file has will be sent to file room.

- **File is due to file room**
  The paper copy is due to the file room within 30 days of the date the discharge authorization was given.