Discharge Tip Sheet

This tip sheet outlines the procedures required to Discharge a client.

Before Discharging a Client

Before creating a discharge, the following preparation must be completed first:

1. **Ensure that all treatment services have ceased.**
2. All events in the **Activity List** must show as **Completed**.
3. Complete a **Final** Outcome Measure.
4. Disenroll client from all programs.

Once all of the above items have been completed, proceed with the following:

Do not discharge until after all treatment services have ceased.

Do not close the episode until all events in the Activity List show as Completed.

Discharge

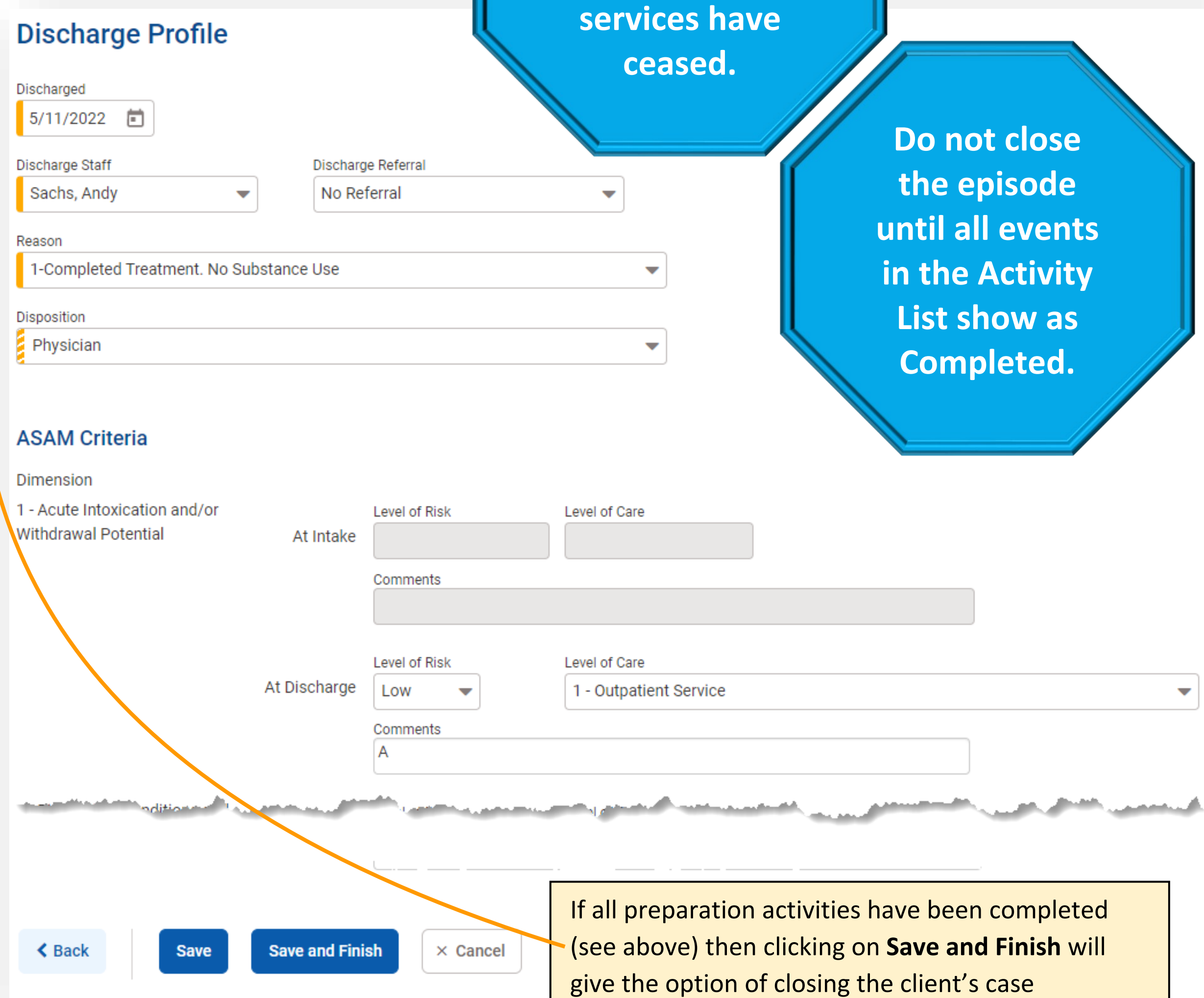
Client List > Activity List > Discharge

Go to the client's **Activity List** and then click on **Discharge**. Complete all required fields, beginning with updating the date at the **Discharged** field to the correct discharge date.

Data from the first signed ASAM, if any, will be pulled in and labeled **At Intake**.

If the client's episode included Substance Use Disorder (SUD) treatment then the **At Discharge ASAM** must be completed as of the last contact with the client. Fully address all ASAM dimensions.

If the client's episode did **not** include SUD treatment then the **At Discharge ASAM** can be skipped. When all required fields have been completed, click on **Save**. After the discharge has been saved, the client has been discharged.



If all preparation activities have been completed (see above) then clicking on **Save and Finish** will give the option of closing the client's case (episode). See the next page for more about closing an episode.

Before Closing a Case (Episode)

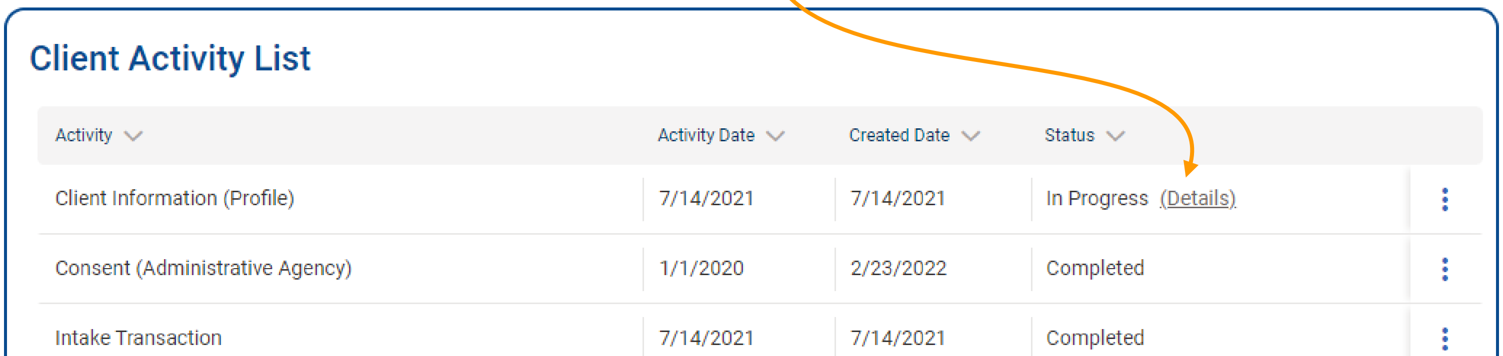
Before closing a client's episode, the following preparation must be completed first:

1. **Ensure that all treatment services have ceased.**
2. All events in the **Activity List** must show as **Completed**.
3. Complete a **Final** Outcome Measure.
4. Disenroll client from **all** programs.
5. Complete the **Discharge** screen.

To satisfy State requirements, the Intake, Client Information, Admission, Outcome Measures and Discharge activities must all display Completed. Any In Progress Activities should be reviewed and completed.

Click on the Details link for a list of what needs to be addressed.

If edits are made, save the record and check the Activity List again to ensure that the Status displays Completed.

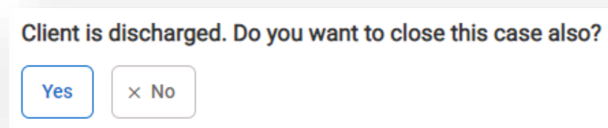

Client Activity List

Activity	Activity Date	Created Date	Status
Client Information (Profile)	7/14/2021	7/14/2021	In Progress (Details)
Consent (Administrative Agency)	1/1/2020	2/23/2022	Completed
Intake Transaction	7/14/2021	7/14/2021	Completed

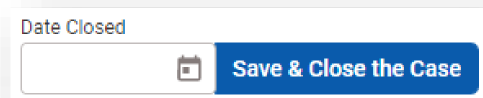
Closing a Case (Episode)

Method #1: When all of the above items have been completed, the quickest way to close a case is to click on the **Save and Finish** button (rather than the **Save** button).

When asked whether to close this case, click on **Yes** to close the client's episode of care (via the Intake) and **No** to keep the case open.



Method #2: Again, when all of the above items have been completed, the case via the Intake screen as well. Open the Intake screen and enter a date in the **Date Closed** field then click on the **Save & Close the Case** button.



When a client's record is closed, the entire episode becomes read-only. If the client returns for another treatment episode then a new episode of care must be opened at the Episode List screen.

Note: If the episode is closed too soon then your Agency Navigator can reopen the episode at the Intake screen. Instructions can be found in the UWITS Administration Guide.