SMART Tip Sheets
Discharge

Discharge

- Discharge
- Closing a Case

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

Total Pages: 3

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Discharge
Dis-enroll/ Discharge

1. Entry Steps: Login, Select Facility, Select Client List, find client, click Activity List.

2. Dis-enrollment: A client must be dis-enrolled from all programs prior to completing a **Discharge**. To do so, click **Program Enroll** from the **Left Menu Tree**. Click the **Pencil Icon** under the **Actions** column, then **Review** next to the active enrollment.

3. Enter the **End Date**, **Termination Reason** and enter any applicable **Notes**. Click **Save**.

4. After the client has been dis-enrolled, click **Discharge** on the **Left Menu Tree**.

5. Enter the client's **Discharge Date** if it differs from the date in the **Discharge** field.

   Note: The current date will pre-populate this field by default.

6. Complete all fields highlighted in yellow.

7. Click ➔ to proceed through the screens.

Discharge

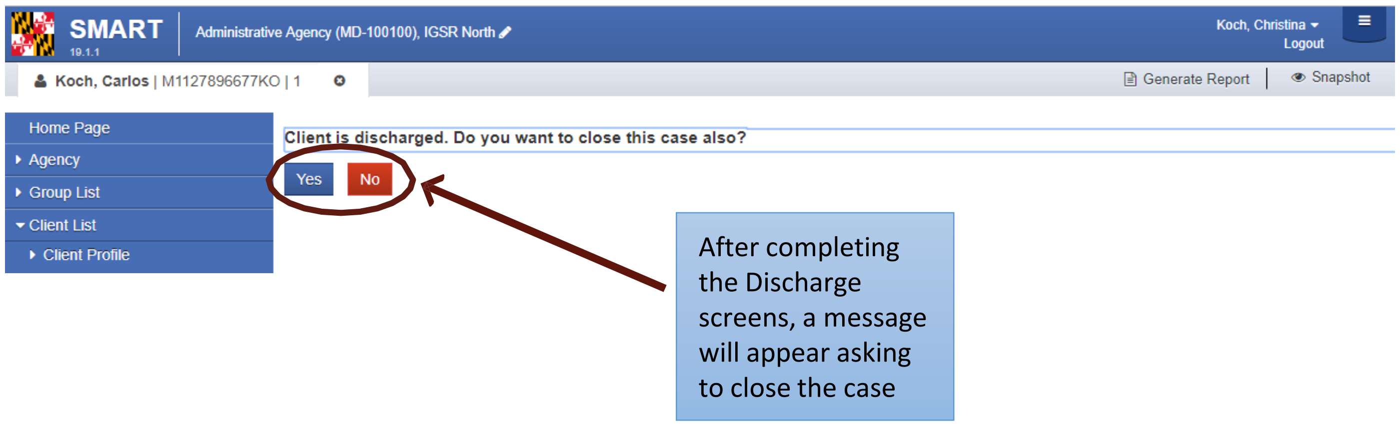
Closing a Case (Episode)

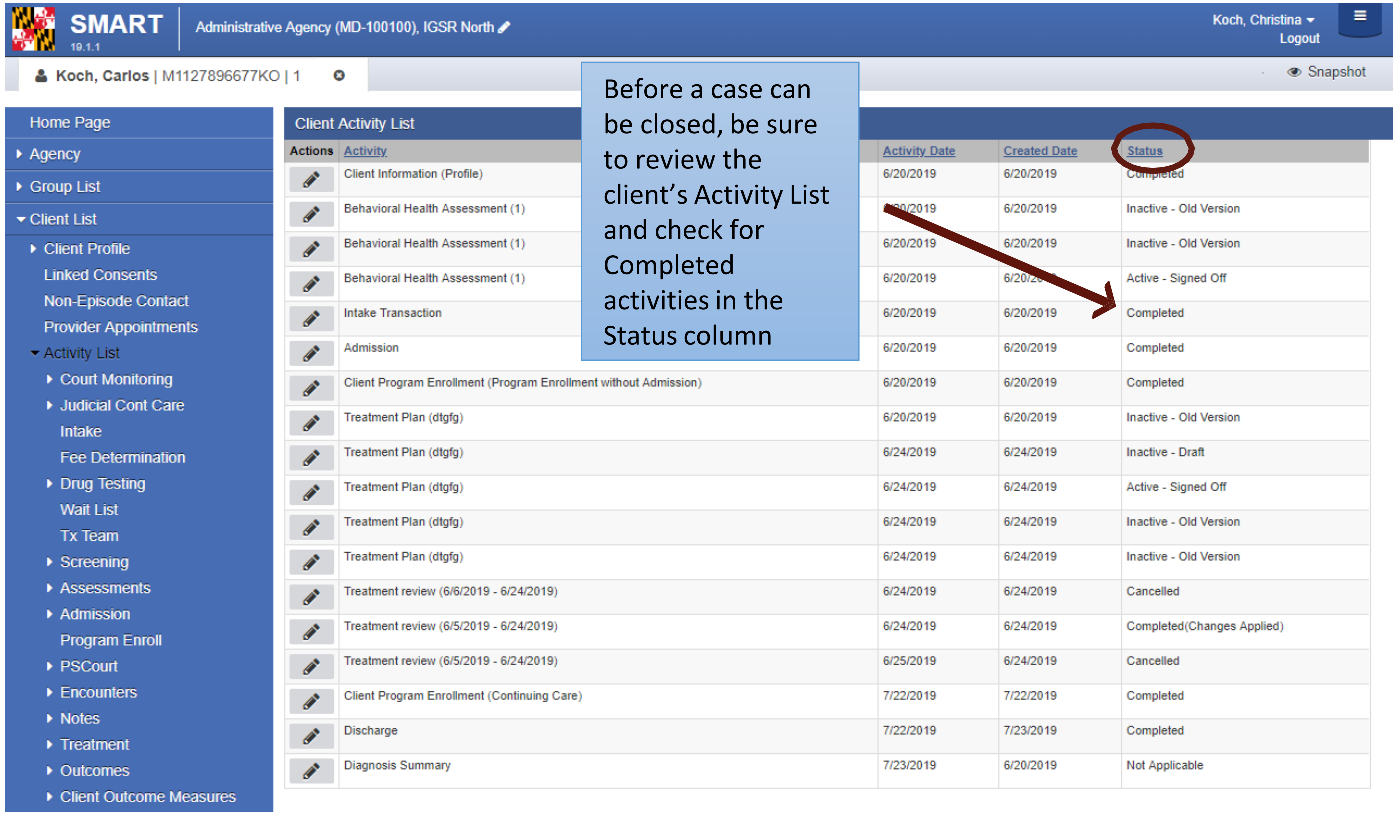
8. <u>Closing the Case: </u>After clicking **<u>Finish</u>** in the **Discharge** screen, the client has been discharged. In some instances, SMART may then ask “Do you want to close this case also?” Clicking **<u>Yes</u>** will close the client’s intake/episode of care. However, if a user mistakenly clicks **<u>Yes</u>**, please ask the agency’s SMART liaison to immediately re-open the case from the bottom-left corner of the Intake screen.

    Note: when a client’s record is closed, the entire client record becomes un-editable. If the client returns for another treatment episode, a new episode of care must be opened from the **Episode List** screen.

9. Before a case can be closed, review the client’s **Activity List** to ensure that all events show **Completed** in the **Status** column. To ensure record continuity, agencies may want to implement the practice of having one staff member review and close records.

    Note: To satisfy ADAA requirements, the **Intake**, **Client Information**, **Admission** and **Discharge** activities must display **Completed**. If it **states In Progress**, review the activity/record and make sure all of the required fields are completed. If edits are made, save the record and check the **Activity List** again to ensure that the **Status** displays **Completed**.





Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	6/20/2019	6/20/2019	Completed
	Behavioral Health Assessment (1)	[illegible]/2019	6/20/2019	Inactive - Old Version
	Behavioral Health Assessment (1)	6/20/2019	6/20/2019	Inactive - Old Version
	Behavioral Health Assessment (1)	6/20/2019	[illegible]	Active - Signed Off
	Intake Transaction	6/20/2019	6/20/2019	Completed
	Admission	6/20/2019	6/20/2019	Completed
	Client Program Enrollment (Program Enrollment without Admission)	6/20/2019	6/20/2019	Completed
	Treatment Plan (dtgfg)	6/20/2019	6/20/2019	Inactive - Old Version
	Treatment Plan (dtgfg)	6/24/2019	6/24/2019	Inactive - Draft
	Treatment Plan (dtgfg)	6/24/2019	6/24/2019	Active - Signed Off
	Treatment Plan (dtgfg)	6/24/2019	6/24/2019	Inactive - Old Version
	Treatment Plan (dtgfg)	6/24/2019	6/24/2019	Inactive - Old Version
	Treatment review (6/6/2019 - 6/24/2019)	6/24/2019	6/24/2019	Cancelled
	Treatment review (6/5/2019 - 6/24/2019)	6/24/2019	6/24/2019	Completed(Changes Applied)
	Treatment review (6/5/2019 - 6/24/2019)	6/25/2019	6/24/2019	Cancelled
	Client Program Enrollment (Continuing Care)	7/22/2019	7/22/2019	Completed
	Discharge	7/22/2019	7/23/2019	Completed
	Diagnosis Summary	7/23/2019	6/20/2019	Not Applicable