SMART Tip Sheets
Discharge

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   Closing a Case

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

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Disenroll/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 **Admission** and then click **Program Enroll**. Click **Review** for all active enrollments. Enter the **End Date**, **Termination Reason** and enter any applicable **Notes**. Click **Save**.

3. After the client has been dis-enrolled, click **Discharge** on the menu tree again.

4. 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.

5. Complete all fields highlighted in yellow.

6. Click ➜ to proceed through the screens.

7. **Substance Matrix** (available only when client has not completed treatment plan): When selecting **Primary Substance** in the **Substance Matrix**, the **Severity**, **Frequency**, and **Method** fields become active after a primary substance is selected. Follow the same procedure if there are **Secondary** and **Tertiary** substances. Also, the most severe substances will always precede the least severe.

Discharge

Closing a Case (Episode)

1. **Closing the Case**: After clicking **Finish** 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 **Yes** will close the client's intake/episode of care. However, if a user mistakenly clicks **Yes**, 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 uneditable. If the client returns for another treatment episode, a new episode of care must be opened from the **Episode List** screen.

2. Before a case can be closed, review the client's Activity List to ensure that all events show **Completed** in the Status column. **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**.

   Note: To ensure record continuity, agencies may want to implement the practice of having one staff member review and close records.