

SMART Tip Sheets Discharge

Discharge

Discharge
Closing a Case

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

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Discharge

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.

SMART QA IGSR | User: Maniac, Titan | Loc: Gilmore Agency (Training Agency), 123 Gilmore Street | Client: McCoy, Hank | M032368987MC | Case #: 1 | October 2010

Program Enrollment Profile

Facility: 123 Gilmore Street | Days on Wait List: []

Program Name: Level I - OP | Start Date: 5/28/2008 | End Date: 8/3/2010

Program Staff: Assessment, Training

Termination Reason: Transferred

Notes: []

Buttons: Cancel Save Finish

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Discharge Profile for McCoy, Hank

Agency Client ID: 1 | Discharged: 8/2/2010 | Date of Last Contact: []

Discharge Reason: Account/Outstanding | Discharge Referral: No Treatment Referral

Reason: Completed Treatment/Referred | Disposition: []

of Times You Have Participated in a Self Help Group in the Last 30 Days: Not Collected

Dimension	Level of Risk	Level of Care	Comments
1 - Acute Intoxication and/or Withdrawal Potential	At Intake	[]	[]
2 - Biomedical Conditions and Complications	At Intake	[]	[]
3 - Emotional, Behavioral, or Cognitive Conditions and Complications	At Intake	[]	[]
4 - Readiness to Change	At Intake	[]	[]
5 - Relapse, Continued Use, or Continued Problem Potential	At Intake	[]	[]
6 - Recovery / Living Environment	At Intake	[]	[]

Buttons: Cancel Save Finish ➔

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Client Discharge for McCoy, Hank

Substance Abuse

Rank	Substance	Severity	Frequency	Method
Primary:	Cocaine	Mild Problem/Dysfunction	1-3 times past month	Inhalation
Secondary:	Benzodiazepines - Flurazepan	Mild Problem/Dysfunction	1-3 times past month	Injection
Tertiary:	Benzodiazepines - Alprazolam	Mild Problem/Dysfunction	1-2 times per week	Injection

of DAYS since LAST use of the substances indicated above: Primary 3 y Tertiary 2

Was Methadone Maintenance Part of TX: [] | Other Addictions: []

Does Client Currently Use Tobacco: [] | Eating Disorders: [] | Gambling: [] | Sex: [] | Tobacco: []

Daily Freq of Cigarette Use: No cigarette use

Discharge Parameters

Discharge Status: Treatment | Post-Discharge Case Management: [] | # of Days: []

Prognosis: [] | As a Result of Evaluation, Was Psychiatric Problem Determined: []

Was a family member involved: [] | Was MH Service Received: Yes

Was Concerned Person Involved: [] | Psychiatric Follow-up: []

Codependent/Collateral: []

Buttons: Cancel Save Finish ➔

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 ADA 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.

The screenshot shows the SMART QA IGSR interface. At the top, the user is identified as Maniac, Titan, located at Gilmore Agency (Training Agency), 123 Gilmore Street. The client is McCoy, Hank, with case number M0323689087MC. A confirmation dialog box is displayed in the center, asking "Client is discharged. Do you want to close this case also?" with "Yes" and "No" buttons. The "Yes" button is circled in red. The left sidebar contains navigation options like Home Page, Agency, Group List, Drug Testing Check In, Client List, Client Profile, MCASP Risk Assessment, Linked Consents, Non-Episode Contact, Activity List, Court Monitoring, Judicial Cont Care, Intake, Fee Determination, Drug Testing, and Wait List.

The screenshot shows the SMART QA IGSR interface with the Client Activity List displayed. The table lists various activities with their dates, creation dates, and statuses. The "Status" column shows various states like "Completed", "In Progress", and "Not Applicable".

Activity	Activity Date	Created Date	Status
Admission	8/21/2007	8/21/2007	Completed
Client Information (Profile)	8/21/2007	8/21/2007	Completed
Client Program Enrollment (Level I - OP)	5/28/2008	5/28/2008	Completed
Client Program Enrollment (Level III 7 - Residential)	8/21/2007	8/21/2007	Completed
Consent (House of Steele (Training Agency))	8/1/2007	3/12/2008	Completed
Consent (House of Steele (Training Agency))	8/1/2007	10/22/2007	Completed
Consent (PG County Circuit Adult Drug Court)	1/1/2007	8/4/2010	Completed
DENS ASI Assessment	8/21/2007	3/26/2008	In Progress (Details)
DENS ASI Lite (Intake)	8/21/2007	10/18/2007	Completed
Discharge	9/3/2010	10/5/2007	Completed
Drug Test Result Summary	3/3/2008	9/1/2007	Not Applicable
ECourt Admission	10/22/2007	10/22/2007	Completed
ECourt Cage Assessment	8/21/2007	8/21/2007	Completed
ECourt Case Management	9/11/2007	9/11/2007	Completed
ECourt Case Management	9/12/2007	9/12/2007	Completed
ECourt Case Management	9/11/2007	9/11/2007	Completed
ECourt Case Management	9/12/2007	9/12/2007	Completed
ECourt Charge Received	9/1/2007	9/1/2007	Completed
ECourt Charge Received	10/29/2007	10/29/2007	Completed
ECourt Charge Received	2/18/2008	2/18/2008	Completed
ECourt Community Service	7/1/2010	11/9/2010	Completed
ECourt Community Service	8/1/2010	11/9/2010	Completed
ECourt Criminal Justice	8/22/2007	3/26/2008	Completed
ECourt Discharge	10/22/2007	10/22/2007	Completed
ECourt Education History	10/22/2007	10/22/2007	Completed
ECourt Education History	10/29/2007	10/29/2007	Completed
ECourt Employment History	8/1/2005	10/22/2007	Completed
ECourt Sanction Incentive	10/22/2007	10/22/2007	Completed
ECourt Sanction Incentive	9/22/2007	9/22/2007	Completed
Encounter Summary	11/27/2007	8/21/2007	Not Applicable
Intake Transaction	8/21/2007	8/21/2007	Completed
Miscellaneous Note Summary	7/1/2008	8/21/2007	Not Applicable