**MOUNT ROGERS COMMUNITY SERVICES  
Discharge Process Guide for Office Staff**

**Discharge from a Program:**  
After the *Discharge Summary* service is completed/approved and has been given or mailed to the individual/Substitute Decision Maker, as applicable, Office Staff shall:

1. Re-check for any unapproved services for the program(s) and notify appropriate staff to promptly review and approve.
2. Review the outstanding balances for the individual and follow-up as stated in the Reimbursement Procedure.
3. Update the Credible Record Manager, if applicable (reference Credible Record Manager Protocol).
4. Unassign the individual from the appropriate team(s)/program(s)/group(s). The Episode tab will be reviewed, and if any dates do not correspond to the effective date of discharge on the Right to Appeal/Notice of Action, necessary corrections should be made.

**Discharge from Agency:**

Office Staff shall complete steps 1-3 from Discharge from a Program (above) and then:

1. Lapse insurances, including self-pay, and liabilities.
2. Update all Release of Information services to Inactive (“*ROI-Inactive*” service type).
3. Update Individual’s status on profile (i.e., Active, Closed, Deceased, Waitlist, etc.)
4. Unassign the individual from the appropriate team(s)/program(s)/group(s). The Episode tab shall be reviewed, and if any dates do not correspond to the Date of Discharge indicated on the Discharge Summary, necessary corrections should be made.
5. Lapse all insurances, including self-pay, and liabilities, using the discharge date as the lapse date. **\*\*Be sure and lapse the insurance, DO NOT inactive insurances.\*\***

**Discharge from Eligibility Assistance, CCBHC, CMHC & Other Grant-Related Programs/Teams**

If the individual is open to the **Eligibility Assistance** program/team, please leave the individual active to the agency and do not update the Release of Information services to “ROI-Inactive”. Once the Eligibility Assistance Specialist has completed their process, they will notify Office Staff so the final closing process can occur.

Please refrain from closing the individual to **CCBHC** or **CMHC** teams. Once services are satisfied within the CCBHC and CMHC teams/programs, designated data entry staff will unassign. If these are the last team/program assignments, designated data entry staff will update the individual profile to the appropriate closing status.

For any other **grant-related** programs/teams, please refrain from closing the individual to grant-related teams. Once services are satisfied within the grant teams/programs, designated data entry staff will unassign. If these are the last team/program assignments, designated data entry staff will update the individual profile to the appropriate closing status.