Discharge Process Guidelines for Office Staff

**Discharge from a Program:**

After Discharge Summary Service is completed/approved and has been given or mailed to the individual/family:

* Office Staff will check for **unapproved services** for the individual and notify appropriate staff to approve immediately.
* Office Staff should review the outstanding balances for the individual and follow-up as stated in the Reimbursement Procedure.
* Office Staff will update the Credible Record Manager if applicable (reference Credible Record Manager Protocol).
* Office Staff will unassign individual from the appropriate team/program/group. The episode tab should be reviewed and any corrections should be made to the discharge date if necessary.

**Discharge from Agency:**

Prior to unassigning individual from the appropriate team/program/group:

* Office staff will need to lapse all insurances, including self-pay, and liabilities.
* Designated office staff will need to update all Release of Information Services to Inactive.
* Update Individual’s status on profile.

\*\*Note: If individual is open to the Eligibility Assistance team/program, leave individual active to the agency and do not update the Release of Information services to Inactive. Once the Eligibility Assistance Specialist has completed their process, office staff will be notified and then the final closing process can occur.

**Discharge for CCBHC Team**

Please refrain from closing to CCBHC team until instructed by data entry staff. At which time, you would continue with process of discharge from Agency as indicated.