



Monterey County Behavioral Health Policy and Procedure

Policy Number	409
Policy Title	Case Closing
References	Policy No. 407 Cancellation/No Show
Form	Closing Summary
Effective	February 1, 1987 Revised: October 4, 1988 Revised: July 26, 1993 Revised: May 23, 2003 Revised: September 01, 2008 Revised: April, 20, 2011

1 Policy

2
3 Closing summaries, as documented in the progress note, will be completed in a timely
4 fashion. Cases will be closed by the 30th day of the last day of service on individuals that
5 are known to be close, i.e., deceased, refuses services, left the county, or planned
6 discharge. Cases will be closed by the 180th day of the last day of service, on individuals
7 that receive no services for 180 consecutive days without apparent reason (administrative
8 closing).
9

10 Procedure

- 11
- 12 1. If the client is receiving services from a staff psychiatrist staff will consult with the
- 13 treating psychiatrist, and document this consultation in a progress note, prior to
- 14 closing the episode.
- 15 2. If there are remaining open care episodes staff will consult with other providers to
- 16 ensure care coordination and potential case coordination transfer.
- 17 3. Closing Summaries, a discharge progress note, will be completed by the
- 18 coordinator, therapist, psychiatrist or assigned BHD staff. If the coordinator,
- 19 therapist, psychiatrist or assigned BHD staff is no longer with the Division, the
- 20 case will be referred to the Unit Supervisor or Behavioral Health Service Manager
- 21 for assignment.
- 22 4. The admitting practitioner of the episode of care is responsible for completing the
- 23 discharge bundle which includes a discharge diagnosis.
24