

How to Close Clients

1. Go to the documentation tab.
2. Click the box to the left of the client's most recent evaluation (diagnosis) so that the box has a check mark.
3. On the upper left corner click on the icon that when you hover over it says "New Summary"
4. Go to the far right and click "discharge".
5. Fill out all areas including current level of functioning, progress, etc.
6. Make sure when filling out the "Recommendations" box you state if you believe client has completed therapy or not. Often clients just stop coming and this is the place to say something like, "Client discontinued making appointments for therapy despite therapist reaching out to client multiple times. It is therapist's recommendation that client continue with treatment, as he has not met his treatment goals".
7. Make sure to total the number of visits in your visit tab and put them in the number of visits box. The number that auto-populates is not accurate.
8. 7. When finished hit save.
9. After closing is completed in documentation tab go to the visits tab and click "new visit" in the upper lefthand corner.
10. Select from the drop down menu "Closed/discharge summary completed" (this is Jenny's quick reference to show a client is closed. No need to fill out the units or minutes. Just leave as is.

If you do not have a treatment plan for your client you will do your closing summary in the notes of the abovementioned visit. Here is a template for this. (Note: only use if you do not have a treatment plan for client due to them only coming for 1-3 sessions, otherwise you need to use the form on the documentation tab)

Presenting Problem (why they came into therapy):

Risk Assessment (if applicable)

Intake Diagnosis:

Discharge Diagnosis:

Number of sessions:

Type of sessions: Intake, Individual, Family, Couple

Progress: (If you only saw the client for the intake, write N/A)

Therapist Recommendations (example): Therapist clinical recommendation was to see client on a weekly basis. Once steady progress was made and mental health symptoms were decreased to begin

meeting bi-weekly. Therapist emailed and called client to schedule for sessions. After two sessions, client never returned therapist's phone calls or emails.