ENVISION
COUNSELING CLINIC

Termination Procedures

A client can terminate therapy two different ways:

1) They can tell you they are finished with therapy.
2) They can simply stop scheduling/attending sessions (for ≥ 60 days).
3) Technically, they could also storm out of the office cursing your name, but let's hope that they'll choose one of the first two options.

When this occurs, there are a few things you will need to do to close out the client's case.

- Complete a *Termination File Audit* form found in TheraNest (it's a tab in the Notes section). It ensures the file is complete before archiving. This form takes you through the following steps:

    a. Make sure your intake form and treatment plan are signed.

    b. Make sure you have notes for every session (that are signed and in TheraNest)

    c. Complete the Accounting for Disclosures form. This form (required by HIPAA) is also in the notes section of TheraNest.
        i. If you have not made any disclosures, complete the form saying that no disclosures were made, and be sure to enter your name at the bottom of the form.

    d. Complete a Termination Summary (a tab in the Notes section)
    (Do not fill out a termination summary when a client only comes once. There isn't anything to summarize.)

    e. If you keep paper notes, clean out their file. Go through any paper file and remove any sticky notes, any notes you made to yourself, any "psychotherapy" notes about the clients. Anything that is not official <u>should not</u> be included in the TheraNest file.

    f. Scan clinical documents and put them in the Clinical Documents tab.

    g. Collect any unpaid fees (or ask admin team for help on this).

    h. Email admin team to say that the client is ready to have an exit survey sent.