Handout 10: Processes for Case Closure

Case closure involves planning for when a person will cease to be supported by CPCC.

Developing a Case Closure Process

The key tasks in developing a case closure process may include:

1. **Determine when case closure will occur.** Services should be clear at the outset about how long clients can stay or be supported by the service and/or what are the indicators for case closure. These may include:
   - Achievement of goals
   - Client's ability to work on goals without support
   - Attainment of long term secure housing
   - Client wishing to discontinue with service
   - Transfer of case management to another service
   - Likelihood of further gains or progress

2. **Develop tools for case closure.** Services need to determine what information they need to record when a client exits a service, or when the case is closed, and how that information is to be recorded.
   - A client exit form may be used to record exit details and any follow-up plan
   - An alternative to a client exit form is to keep a checklist of the kinds of information you may need to record when a client leaves. This checklist can be used as a prompt and the information recorded on case notes
   - Identify appropriate community resources. Case closure and exit planning includes identifying the ongoing support needs of clients and where possible linking them in with relevant supports in the community. This could include their own network of friends, relatives, cultural group and support groups as well as other service providers.

3. **Develop a policy on follow-up.** Services may provide follow-up through their own staff, or may arrange follow-up through referral to other services in the community. The type and amount of follow-up required will depend on the needs of the clients and the resources of the service.

4. **Develop written policy and procedures.** Case closure and follow-up processes are put into action through the development of written policy and procedures, and staff training in these procedures. Policy and procedures for case closure and follow-up may include:
• When will case closure occur?
• Information to be recorded and the tools to be used
• Follow-up that may be provided
• Paper work that needs to be completed