



# HURON BEHAVIORAL HEALTH OPERATIONAL POLICY

Policy #: **SD.1.06**  
Issue Date: 03/05/04  
Rev. Date: 01/03/18  
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## Title: Aftercare Plan and Follow-up Policy

Prepared By: Clinical Director

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### Purpose:

To define the guidelines to be used for aftercare planning when a consumer is terminated/discharged from services.

### Scope:

This policy applies to all employees (including full-time employees, part-time employees, contractual providers, volunteers, students, and/or interns) of Huron Behavioral Health (HBH) and all consumers served.

### Information:

N/A

### Policy:

1. When a consumer is discharged (closed) from services at HBH, the primary worker completes a "Discharge Summary" in the Electronic Medical Record (EMR) system which includes follow-up and aftercare planning. ([See also SD.1.02 Termination of Services Policy](#)).
2. The Discharge Summary should be developed with the individual/parent/guardian sufficiently in advance of the termination to assure that the transition is orderly and seamless.
3. The Follow-up and Aftercare Recommendations portion of the Discharge Summary should address the following areas (as applicable):
  - Referrals to outside agencies
  - Services needed or desired and plans/steps for the consumer to obtain the services
  - Consumer tasks and assignments in order to maintain/continue progress after discharge
  - Other aftercare activities to be provided (be specific including the nature and frequency of aftercare contact, when applicable)
  - Staff/agency responsible for assisting with the transition
4. If the consumer requests assistance and gives written consent, the worker will explore resources and make contact or referrals to other service providers identified in the aftercare plan to assist ~~them~~ the individual with the transition.
5. The supervisor must review and electronically sign the Transfer/Program Change/Discharge Form which includes the aftercare planning.
7. The Transfer/Program Change/Discharge Form (which includes any follow-up and aftercare activities) is retained in the consumer's case record and a copy is given to the consumer.
8. With the consent of the consumer, and when clinically appropriate for follow-up activities, the worker will conduct the follow-up activities and document such activities in the case record as they occur.

Note: The consumer has the choice of declining aftercare planning and receiving a copy. When this occurs, the worker should document this in the case record.

### Definitions/Acronyms:

COA – Council on Accreditation  
EMR – Electronic Medical Record  
HBH – Huron Behavioral Health

**Title: Aftercare Plan Policy**

Prepared By: Clinical Director

Procedure #: SD.1.06

Issue Date: 08/08/01

Rev. Date: 01/03/18

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Discharge Summary (in EMR)

**Records:**Records of aftercare plans and follow-up activity are retained in the consumer's case record in accordance with the HBH Record Retention and Storage Policy ([QI.1.23](#)).**Reference(s) and/or Legal Authority**

COA standards

[QI.1.23 HBH Record Retention & Storage Policy](#)[SD.1.02 Termination of Services Policy](#)**Change History:**

Change Letter	Date of Change(s)	Changes
None		Old procedure brought into new Controlled Documentation format with minimal content changes.
A	01/28/09	Reviewed and revised to comply with COA 8 <sup>th</sup> Edition Standards and present practices – removed COA chapter-specific reference (S5), removed 90-038 (Closing & Aftercare Plan Form) & replaced with 90-1001 regional "Transfer/program Change/Discharge Form" throughout policy, removed 30-001 and 90-208 (HBH Progress Note Forms) & replaced with regional Progress Note Form (90-1008), in "Records" section added "EMR" sentence, added "EMR" to "Acronym" section, removed the list of bullets/programs from #1 as this applies to all programs.
B	03/20/13	Reviewed and revised to comply with 8 <sup>th</sup> edition COA standards – in "Forms" section changed "regional form" to "EMR form" (2 places), in "Records" section removed "regional (2 places)", in #1 removed "Gallery".
C	03/23/16	Removed form numbers throughout document (4 places), changed form names to match current EMR system, made several minor grammatical/spelling changes/corrections throughout document without changing sentence content.
D	01/03/18	In "Policy" section moved #5 to #8, made several minor wording/grammatical changes/corrections throughout document without changing sentence content.