



HURON BEHAVIORAL HEALTH OPERATIONAL POLICY

Policy #: **SD.1.06**
Issue Date: 03/05/04
Rev. Date: 09/26/23
Page: 1 of 2

Title: Aftercare Planning 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 discharged from services or his/her services are terminated.

Scope:

This policy applies to all employees (including full-time and part-time employees), contract clinical 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 "[Case Closing/Discharge Policy](#)" SD.1.02).
2. The discharge summary should be developed with the individual/parent/guardian sufficiently in advance of the termination of services 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 a consumer requests assistance and gives written consent, the primary worker will help the individual explore other resources and make contact or referrals to other service providers identified in the aftercare plan to assist 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 in the EMR system 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/or receiving a copy of the aftercare plan. When this occurs, the worker should document this in the consumer's case record.

Definitions/Acronyms:

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

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Rev. Date: 09/26/23

Page: 2 of 2

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Forms:

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 th 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 th 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.
E	12/03/19	In "Scope" section changed "contractual providers" to "contractual clinical providers", corrected hyperlinks, made several minor wording/grammatical changes/corrections throughout document without changing sentence content.
F	10/26/21	Made several minor wording/grammatical changes/corrections throughout policy without changing sentence content.
G	09/26/23	Made several minor wording/grammatical changes/corrections throughout policy without changing sentence content.