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 the workroom file cabinet). It ensures the file is complete before archiving. Once complete, leave this form in the file. If you are paperless, please give this completed form to Veronica. This form takes you through the following steps:
* Send the client a termination letter and exit survey\* (samples attached). If they terminate with you in person, please hand them an exit survey. No termination letter is needed in this case.

* Complete a Termination Summary.
  1. The termination summary is located within the client’s case in TheraNest. After choosing the client, choose the “Notes” tab. You will then see “Termination Summary” as a tab. Click on it and fill it out.
  2. Do not fill out a termination summary when a client only comes once.
* Clean out their file.
  1. Go through their paper file and remove any sticky notes, any notes you made to yourself, any “psychotherapy” notes about the clients. Anything that is not official should not remain in the file.
  2. Shred the CC# form
* Complete the Accounting for Disclosures form.
  1. This form (required by HIPAA) is also in TheraNest within the client’s case. Click the “Notes” tab, then the “Accounting for Disclosures” tab.
  2. 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.
* Collect any unpaid fees.
* Give the file to Veronica for long-term storage.
* Archive the client in TheraNest.

\*An exit survey is an excellent way to gather (a) stories of how ECC has improved the lives of our clients, (b) suggestions on how to improve our services, and (c) mailing list contacts to increase client returns.

**PAPERLESS PROCEDURES**

* Scan all documents from the paper file, and drop them into the TheraNest file
* Double check that all documents are stored into TheraNest.
* Shred all paper copies.