

## **Case Closure**

### **I. Policy Summary**

The Vision Rehabilitation Specialist (VRS) must close the client's case record of service when:

- The client and the VRS agree the client has successfully met his/her goals as identified on the plan.
- The client has attained increased independence in the goal(s) stated on the plan.

### **II. Procedures for Clients Who Have Met Their Goals**

Once the client and the VRS have determined that all goals have been met and agree that services are no longer required, the VRS must close all goals and close the case. If there are no open goals, the case must be closed.

- The VRS must document the client no longer requires services and that the client agrees to close the case. If at such time the client feels he/she may need additional services:
  - The VRS must document the reason he/she is keeping the case open and follow-up with the client monthly to determine what services are still needed.
  - The VRS must keep an open goal if the case is still open to reflect he/she is still working on services with the client.
- It must be made clear to the client when services have been completed that the client may request further services if his/her situation changes in the future.
- When the case is ready for closure, the case in AWARE ND is closed and a Vision Rehabilitation Services Program Satisfaction Survey is sent to the client (as per section IV of this policy) and the VRS documents that a survey was sent.

### **III. Procedures for Clients Who are No Longer Available for Services**

There are circumstances that lead to a client no longer being available for services.

These circumstances may include when a client:

- moves into a skilled nursing facility
- moves out of state
- passes away
- refuses services
- cannot be located
- opens a VR employment 110 case

In these situations, complete the case closure.

### **IV. Sending a Vision Rehabilitation Services Program Satisfaction Survey**

Every effort must be made to send a Vision Rehabilitation Services Program Satisfaction Survey to clients. There are circumstances in which a survey would not be sent. These circumstances include when a client:

- passes away
- cannot be located

The VRS must document in AWARE ND that a Vision Rehabilitation Services Program Satisfaction Survey was sent to the client.

### **V. Deceased Clients**

If a client passes away while in service status the VRS must document in the case note that the client passed away and that is the reason for case closure. If the client happens to pass away while the VRS is present then the VRS must complete an incident report in the Office of Management and Budget (OMB) Risk Management Incident Reporting System (<https://omb.nd.gov/incidentreporting>) within 24 hours of learning of the clients passing. When entering an incident report use the 'Medical Case' tab. The VRS must document that the incident report was completed in a case note.

### **VI. Opening a New Case vs. Backing Out a Closure**

At times, an individual whose case has been closed may request additional services. This could be the result of additional areas of need, change in vision, or change in level of support in the home environment. In most situations opening a new linked case will be required. In the rare circumstance, a closure needs to be backed out in order to follow-up on a previously provided service, the VRS must consult with the State office. An example of this scenario may be when a client requests follow-up for previously provided services and the case has been closed for less than two months.

If a case is closed and then reopened in the same fiscal year, there is no need to send another Vision Rehabilitation Services Program Satisfaction Survey.

**Summary of Changes:**

9-2023 – Amended the required form for Section V Deceased Clients.

3-2024 – Took out the requirement to complete an incident report through OMB.