

## ADVISORY to Katrina Aid Today

### Case Managers: *Prompts for Closing Cases*

The work of Katrina Aid Today case management is evolving to emphasize the closure of cases based on client outcomes and the achievement of recovery plans. The case management process requires that discussions of case closure should start taking place during the intake process, through the initial assessment, and continue to shape during the development of the recovery plan. The overall goal of the process is to ensure a client's self-sufficiency.

As KAT case managers review their caseload, open cases should be reviewed periodically so that cases are transitioned to closure without unnecessarily lingering as an open and active case.

This Advisory emphasizes important aspects of case closure and includes prompts to lead case managers to decisions regarding case closure.

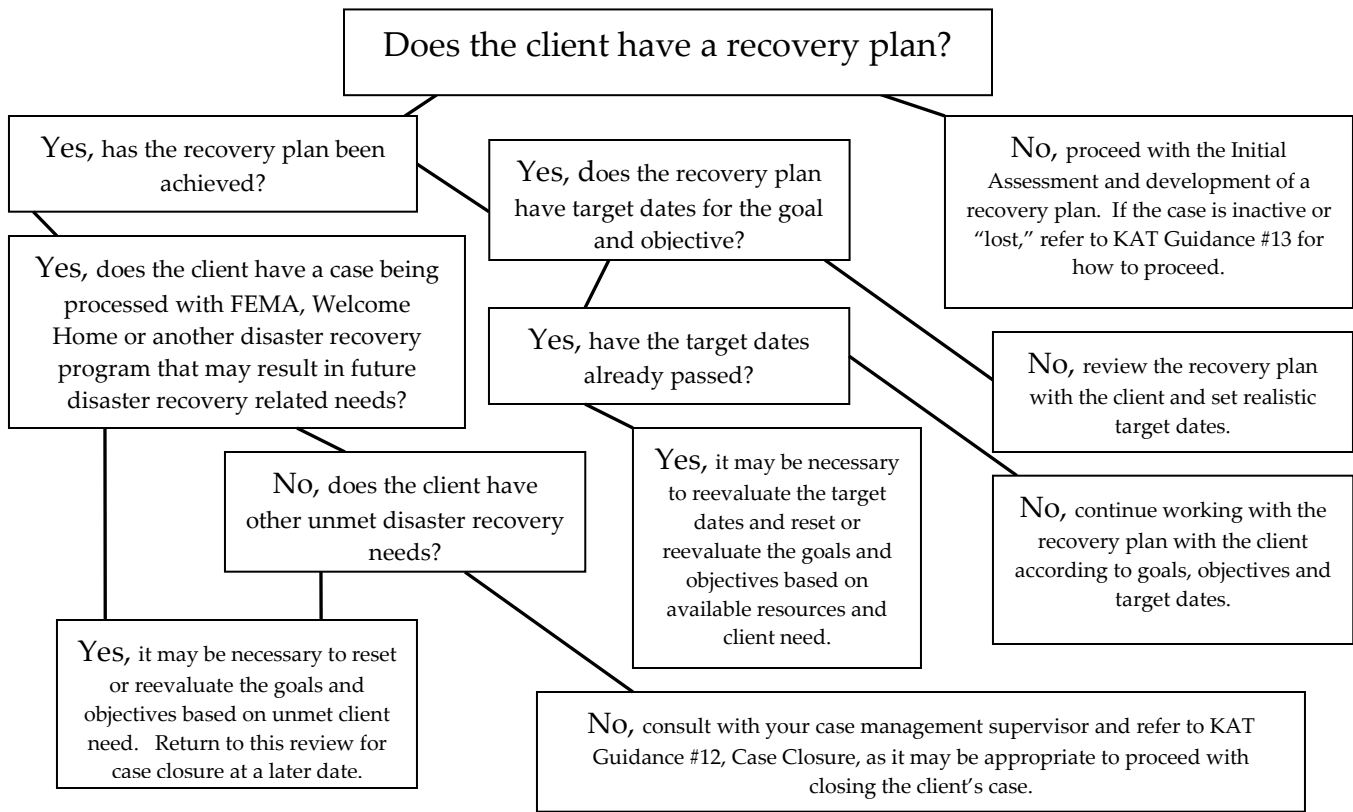
#### **What has KAT advised regarding case closure?**

Referring to KAT Guidance #12, Case Closure, and KAT Guidance #13, Inactive Cases:

- As a disaster recovery case management program, KAT case management should ideally conclude with the achievement of the client's recovery goal, which is time-limited based on the target dates set by the client and case manager as set forth on the Recovery Plan.
- The closure of KAT cases should be documented with the completion and signature of the KAT required "Case Closure/Summary Form", and the completion of the Case Closure section in CAN. (Verbal communications may be necessary for this process. If so, the case manager may indicate "via phone" in the client's signature line.)
- As prompted by the Case Closure/Summary form, the case management should consult the case management supervisor for authorization in closing a case.
- As part of case closure, the client should be offered a Client Satisfaction Survey for their voluntary completion.
- If a client returns to the agency for disaster recovery case management following the closure of their case with an agency, the agency may reassess and opt to re-open their case, marking the client's case status in CAN as "open."
- If a client appears at another KAT partner for disaster recovery case management following their case closure at another KAT partner agency, the agency greeting the client should consult with the case manager assigned to the case at the time of closure prior to proceeding with renewed case management services.

*Note: Consult KAT Guidance #12 and #13 for a more thorough review of case closure and inactive cases as the above is only a sampling of the information covered in these guidances.*

## Prompts for Deciding Whether a Client's Case is Ready to Close:



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### Other prompts for case closure to consider:

- Is the case lingering on your caseload due to lack of available resources to meet the client's needs? *If yes, are resources available through Long Term Recovery Committees, American Red Cross Means to Recovery, or similar resource mechanisms? If not, consider revising the recovery plan with a goal that is achievable within the scope of available resources or consider case closure for the reason of "unable to resolve because of lack of resources."*
- Have attempts to contact client been unsuccessful for 30 days? *If yes, refer to KAT Guidance #13, Inactive or "Lost" Contact on how to proceed.*
- Is the client's unmet need "disaster" related? *As a disaster recovery case management program, KAT case management is intended to assist clients in their disaster recovery. In the process of case management, other non-disaster-related needs may be identified, which may require judgment decisions by the case manager and/or case management supervisor. Upon achievement of the disaster recovery goals, assess the availability of other case management programs or other programs that can assist the client with the non-disaster related needs so that the case can be closed for "Recovery Plan achieved" and then make appropriate referrals for the client's other unmet needs.*
- Has the case been open for six months or more? *While KAT has no time limits, the program aims for disaster recovery and self sufficiency for clients. If a client requires case management 6 months following the date of case open, consider whether the client's needs are disaster related and if the client is assuming responsibility for their own recovery. It is encouraged that the case manager consult with case management supervisors on the recovery plan goals and target dates. Also, keep in mind that a case can be reopened (mark it as "open" in CAN) if a client presents themselves with a disaster-related need following the case closure.*