Entry and Exit Planning Policy & Procedure

APPROVED BY: Pathways SouthWest Board of Management

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VERSION: 1

THIS POLICY & PROCEDURE APPLIES TO: Pathways SouthWest Board of Management, Staff, Students, Volunteers, Consumers, Carers, other Stakeholders and the General Public
Entry and Exit Planning Policy & Procedure

Entry and Exit Policy
This policy mandates that all Pathways SouthWest staff shall work together towards a coordinated and effective service that recognises entry into and discharge from Pathways SouthWest. Entry and exit is viewed as a single process that enables staff to provide structured and continuous care. Accordingly, discharge planning commences at the point of entry and continues throughout the service user’s engagement with our service. For full details of access to Pathways services, refer to Access and Equity Policy.

Entry:
- All service users referred shall be considered for inclusion into our service.
- All referrals shall be triaged by Service Delivery Manager and discussed with the team to determine appropriateness of the referral.
- If the referral is considered appropriate, an assessment shall be undertaken with the service user and “nominated other” (carer and/or family member) as appropriate.

Exit:
Exit planning involves the development and maintenance of a specific plan, for each service user, for the process to be followed when that service user is ready to leave or chooses to exit our service. Whenever possible, this is a collaborative process with service users, carers, families, nominated others and other relevant service providers. Refer to Exit Planning Guidelines.

Principles
The principles that underpin this Policy, and which have been taken into account in the formation of this Policy, are articulated in the Access and Equity Policy.

Procedures
Pathways staff shall plan for entry and exit in accordance with the Exit Planning guidelines.

Responsibility
It shall be the responsibility of the Chief Executive Officer to ensure that the requirements of these procedures are complied with.

Related Documents
Access and Equity Policy
Exit Planning Guidelines

Definition
- Exit planning is when a specific plan or process is made for what happens with a service user who is ready to leave or exit the service. Whenever possible, this is a collaborative process involving service users, carers/families (or nominated others) and other relevant service providers.

Reasons for exit
- Service user goals are met.
- Service user has transferred out of area.
- Service user does not engage with service which includes having contact less frequently than monthly.
- Service user declines ongoing support.
- Service user has transferred to another organisation.
- Change in service user risks are too high to be managed safely.

Involvement of carers or “nominated person”
- Whenever possible, a “nominated person” who provides care or support to the service user shall be involved. This may include a family member, carer or friend.

When does exit planning commence
- Exit planning commences upon entry to Pathways SouthWest service – it must be documented on entry checklist. (Template: Entry Check List)

Who decides the service user is to be exited
- The decision to exit a service user is made jointly during team reviews with the Service Delivery Manager.

How is a service user exited
- Reasons for exit identified at review meetings including degree of contact that the service user and their “nominated support person” (e.g. family member, carer, etc.) is having (if appropriate).
- Best option chosen based upon service user and “nominated other” needs.
- Considerations include but are not limited to: transition to groups, discussions with nominated support person/family or others involved in care such as health professionals or agencies, ways to motivate service users to engage with the service.
- When exit is considered to be the best option, an exit letter must be sent to the service user advising them that they are going to be exited. Although a template is available for use, each exit letter must be personalised to meet the unique circumstances of exit. The letter must advise how the service user can re enter Pathways South West. (Attachment: Exit Letter Template)
- The exit letter must inform the service user that they have 14 days to respond – this may be in person, by phone, email or letter or via a carer or “nominated other”.
• If there is no response, the service user shall be exited.
• All documentation must be completed – this includes updating the electronic data base and hard copy file.

Exiting out of area or to another service provider
• When a service user notifies that they are moving out of area or being transferred to another service provider, the support worker must provide information to promote a smooth transition of care according to the service user needs.
• A 14 day transition period shall be considered.
• During this period, regular contact between Pathways SouthWest support staff, the service user, carer and family members (if applicable), and new service provider must be undertaken to ensure effective engagement and additional support in establishing a new connection or “treatment alliance”.
• Consent to share appropriate information from the service user with the new service provider must be obtained. If the service user does not give consent, the only information that may be released is that which is reasonably required for on-going care of the person to whom it relates.
• If the service user does not transition to the new service and remains within Pathways SouthWest catchment area, the service user shall be able to access services provided by Pathways SouthWest.

Documentation of the exit process
• Exit planning is commenced upon entry to the service.
• A review is conducted which includes consultation wherever possible with the service user and “nominated others” prior to exit.
• Any necessary referrals to support the service user are undertaken.
• A 14 day transition period is identified.
• Exit is formalised in writing.
• The service user, “nominated other” (if relevant), have been advised how to re-enter the service if necessary in the future and have been provided with emergency contact numbers.
• Exit check list completed.
• Electronic data base updated with hard copies placed in service user file.
## Client Entry Form Checklist

<table>
<thead>
<tr>
<th>Date</th>
<th>Item: Prior to Assessment Interview</th>
<th>Initial</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Has the referral form been received?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Has a Risk assessment been completed?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Has an assessment form been completed?</td>
<td></td>
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<tr>
<td></td>
<td>Enter all demographic data on to SMS. Note any information missing. **</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Make up hard copy file – demographic labels printed – copy of label to be placed on all documents and forms</td>
<td></td>
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<tr>
<td></td>
<td>Has the client’s carer or nominated other been identified and involved in care planning if acceptable to the client?</td>
<td></td>
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<tr>
<td></td>
<td>Allocate support worker to service user.</td>
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<tr>
<td></td>
<td>Prepare forms for client interview – Confidentiality Brochure, Consumer Rights and Responsibilities, Photograph Permission form, No Response Policy, No Response Plan, Feedback Form, Client Information Pack</td>
<td></td>
</tr>
</tbody>
</table>

### Item: During Assessment Interview

- Inform client of the emergency evacuation procedures for area in which assessment is being undertaken.
- Supply client with “Confidentiality Brochure” and “Consumer Rights and Responsibilities”. Explain how both documents relate to them.
- Collect any further information as noted above ** Note any allergies.
- Give client a copy of the “No Response Policy”; complete a “No Response Plan”?
- Inform client of how to access Pathways policies and procedures
- Advise client of how to access personal information held by Pathways
- If client gives permission to be photographed, complete permission form.
- Provide information on how to make a complaint, provide a compliment or give feedback
- Advise service user of exit planning requirements
- Commence Care Plan
- Complete Care Plan – expected completion date ____/____/______
- Provide client and/or their carer / nominated other with an information pack
- Introduce service user and carer to staff and their roles

Support Worker to sign off each item on completion as discussed with consumer.
Pathways South West Graduation/Exit Checklist

Client’s name: ________________________________

List client’s individual strengths and unique skills:

List protective factors:

Tick if yes:
- Discussed ‘exit’ with case manager (if relevant); no concerns raised [Date: ____________]
- No significant relapse or hospitalisation in the last 12 months
- Care plan or Crisis Care Plan completed, and on file
- Finances managed
- Goals achieved
- Support network outside of Pathways South West
- Better Outcomes counselling offered
- MI Recovery offered
- Family meeting been offered/organised (if applicable)
- Emergency contact numbers

Why are you recommending to graduate / exit?

Have you discussed this with client? Yes / No

Have you discussed with family member or carer? Yes / No
Exit Letter Template

Date

Dear XXX

Pathways SouthWest is reviewing all service users. It appears that we haven’t seen or heard from you for some time now.

Does this mean you no longer require Pathways’ services? If you wish to continue with our services you must respond within 14 days.

You can respond by:

- Phone – 9791 1257
- Visiting us at 1/14 Rose Street, Bunbury
- Writing to us at PO Box 275, Bunbury WA 6231
- Email, OR
- Your carer or family member may contact the service.

If we do not hear from you during this time, we will take it that you no longer wish to continue with our service and as such you will be exited from our service.

Should your circumstances change and you wish to return to our service, you will require a new referral from your mental health Case Manager, GP or psychiatrist.

I trust you are well and I wish you the best in the future.

Yours sincerely,

Recovery Worker