Discharge Plan Completion Checklist – Provider Use

Use this checklist to support discharge planning and ensure documentation is complete, consistent, and audit-ready.

Member Status at Discharge

☐ Treatment plan reviewed and updated
☐ Clinical stability demonstrated
☐ Sustained symptom reduction documented
☐ Independent coping skill use demonstrated
☐ Functional stability across domains documented

Discharge Criteria Met

☐ Discharge criteria aligned with intake
☐ Criteria reviewed with the member
☐ Criteria met and verified (observation, self-report, screenings)
☐ Target symptom reduction achieved
☐ Functional goals met or substantially achieved

Service Review and Level of Care Adjustments

☐ Services appropriately titrated
☐ Stability maintained at reduced frequency
☐ No symptom exacerbation during step-down
☐ Clinical rationale for titration documented

Discharge Decision and Care Team Coordination

☐ Care team review completed
☐ Updated screening tools completed and documented
☐ Discharge decision made collaboratively
☐ Member actively participated in discharge planning

Member Education

☐ Education provided on primary diagnoses
☐ Education provided on co-occurring conditions
☐ Member can verbalize warning signs and symptoms

Coping Skills and Self-Care Plan

☐ Coping skills identified and documented
☐ Independent skill use demonstrated
☐ Self-care routines established

Medical and Behavioral Health Follow-Up

☐ Psychiatric follow-up addressed
☐ Medication management plan reviewed
☐ Primary care follow-up addressed (if applicable)
☐ Member understands how to access services

Crisis and Safety Planning

☐ Crisis resources reviewed
☐ Member understands when and how to access crisis supports

Natural and Community Supports

☐ Ongoing recovery supports identified
☐ Family or natural supports documented
☐ Community-based supports identified

Relapse Prevention Plan

☐ Triggers and warning signs identified
☐ Coping strategies documented
☐ Supports linked to relapse prevention

Discharge Justification

☐ Medical necessity no longer met
☐ Treatment goals met or substantially achieved
☐ Stability maintained with reduced services
☐ Ongoing needs manageable post-discharge

Discharge Summary

☐ Discharge summary completed
☐ Member readiness documented
☐ Member agreement with discharge plan noted