Case Closure Checklist

Transfer of Learning

We create experiences that transform the heart, mind and practice.

APSWI is a program of the Academy for Professional Excellence, and a project of San Diego State University School of Social Work.

Transfer of Learning Tool-

Case Closure Checklist

HANDOUT #9

Use a case of your own in the office, prepare it for termination when the time is appropriate. Do the following:

1. Answer these questions:

   - What is the evidence that the client is safer and no longer at risk (or at reduced risk)?

   - What is the evidence that client's self-determination was respected and the least restrictive interventions were taken?

   - What is the evidence that the case was handled ethically and legally, and agency procedures were followed?

2. Follow the Case Closure Checklist:

   - ☐ Update Risk Assessment
   - ☐ Collect evidence as required
   - ☐ Investigate and document all allegations
   - ☐ Verify protective services have been offered/provided
   - ☐ Make sure all reasonable efforts have been tried
   - ☐ Notify other agencies or boards as needed
   - ☐ Inform client of case closure. If the client lacks capacity to consent, notify a significant other
   - ☐ Closing Case Summary to Supervisor

3. Write a Case Summary as required by your agency. If your agency does not require a summary, write one using the information given to you in this training.

4. Submit the materials to ______________________________

OUR WHY:

REVOLUTIONIZE THE WAY PEOPLE WORK TO ENSURE THE WORLD IS A HEALTHIER PLACE.

Academy for Professional Excellence

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