Removing CPA Clients from an HCP Caseload

When you are added as a CPA Co-ordinator for a Client in RiO the Client will display on your caseload in blue.

The Client will remain on your caseload even if their referral is discharged until you complete a Discharge Review

Firstly **Record** a Discharge Review:

◊ Open the Client's Clinical Portal

◊ Click the **CR—Mental Health** folder (Navigation pane to the right)

◊ Click the **CPA Review** link

- The **Search** screen will display

◊ Your Client will be in the top **Client ID** field, click **Go**

- The **CPA/Standard Care Management - Reviews** screen will display

◊ Click the **Schedule CPA Review** link (bottom of screen)

◊ Complete the **Intended Duration**, **Review Date/Time** & **Location** fields

◊ Click the **Save** button (bottom of screen)

- An Information prompt will display

◊ Click Save Without an Appointment

Secondly **Complete** the Discharge Review

- The **Scheduled review** will now display at the top of the screen

◊ Click the green **Outcome this review** button

◊ Complete the Review to reflect your interaction with the Client

◊ You MUST complete all **Mandatory** (pink) fields

- Locate the **General Details** section

◊ You MUST select a **Review Type** of **Discharge**

◊ **Tick** to **Validate** the review

◊ Click **Save** (bottom of screen)

The **Discharge Review** is now **complete** and the **Client will be removed from your Caseload**