

Unit Order #19-0014 PROCEDURES FOR CLOSING AND/OR TRANSFERRING CLINICAL CASELOAD

Effective Date: September 19, 2019

PURPOSE OF ORDER:

The purpose of this order is to set forth procedures that are necessary for the Bureau to operate ethically, efficiently, and effectively. Following these standards is an essential component in upholding the values and mission of the Department and our Bureau.

SCOPE OF ORDER:

This order applies to all psychologists assigned to Psychological Services Bureau (PSB).

ORDER:

When a staff psychologist is closing and/or transferring his/her clinical caseload temporarily or permanently, the following sequential steps shall be followed:

- i. Whenever possible, all clients must be notified in advance and a discussion with clients need include continuing treatment recommendations, treatment options, appropriate referrals, and/or termination when indicated.
- ii. The psychologist shall provide the immediate supervisor a written list of all active clients with information on the action plan for each individual/couple/family. The psychologist can make recommendations on good matches between clients being transferred and the best suited clinician for the client or client's presenting problem(s). Prior to finalizing the transfer of clinical cases to other staff clinicians, approval must be received by the referring clinician's immediate supervisor.
- iii. For clients who will be transferred to another PSB psychologist, the staff psychologist transferring his/her clients shall inform the new clinician(s) of the transfer and provide relevant treatment history and treatment progress information prior to the transfer therapy session.

PSB managers/supervisors shall take appropriate action to address all violations or deficiencies in following this order, including non-disciplinary corrective action for the involved employee, and/or referring the incident for disciplinary action. PSB managers/supervisors are responsible for tracking violations or deficiencies and the corrective action taken for each incident.
