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**Template Exit Planning Checklist**

It is the intent of Recovery Home that each resident successfully move out of the recovery home fully prepared for the next step in their journey of recovery in accordance with Recovery Home’s Exit Planning Policy.

This checklist is designed for residents who are moving out in a planful manner, but recovery home recognizes that some residents may not engage in the entire move out process. Not all items may be able to be completed due to the resident moving out without notice or under unpredictable circumstances. The resident may also refuse to participate in specific items on the checklist.

The recovery home will attempt to complete all items as appropriate or document reasons why steps could not be taken.

*Assessment and Goal Setting*

Conduct a comprehensive assessment of the resident's readiness to move out and their specific needs post-transition. Review resident’s recovery plan, recovery capital scale, wellness assessments and other materials. Collaborate with the resident to identify their goals and preferences for their new living environment.

*Referral and Resource Planning*

Identify and connect the resident with appropriate community resources and services, such as housing programs, outpatient treatment, vocational training, mental health support, employment assistance, recovery community programs, social support programs, food and utility resources.

Document all referrals made, including contact information and the nature of the referral.

Ensure that the resident is aware of and has access to any ongoing support services they may need after leaving the recovery home.

*Housing Preparation*

Assist the resident in locating safe and stable housing options, considering factors such as affordability, location, and support services available.

Provide information on the application process and requirements for housing programs or rental properties.

*Financial Planning:*

Review the resident's budget and financial resources to ensure they have the means to cover housing expenses.

Discuss strategies for financial stability, including opening a bank account, managing expenses, establishing a budget and applying for any assistance that is needed.

*Exit Date and Logistics:*

Determine the resident's planned move-out date and time.

Collect written notification from resident that they will be ending their lease agreement as of the planned move-out date.

Discuss logistics, such as packing, transportation, and coordination with the new living arrangement.

*Documentation and Records:*

Ensure the resident’s financial account is settled or any further payment plans are clear

Ensure that the resident receives copies of important documents and records, such as their recovery plan and referral summaries.

*Property Inspection:*

Conduct a final inspection of the resident's living space to ensure it is clean, undamaged, and free of personal belongings.

Address any outstanding issues related to property damage or lost items.

*Farewell and Support:*

Provide emotional support and encouragement to the resident during their departure.

Reinforce the importance of staying connected to their recovery support network and attending scheduled follow-up appointments or meetings.

Arrange for a time for the resident to come back to the home and visit others, if appropriate.

*Post-Move-out Follow-Up:*

Maintain records of the resident's move-out process, including dates, actions taken, and outcomes.

Document any feedback or insights that may inform future transitions for residents.

Encourage the resident to provide feedback on their experience at the recovery home and the move-out process.

Use resident feedback to continually improve the transition and support services offered.