

Internal patient transfer process

In some instances patients wish to transfer their care from one DB practice to another. It's a request we can most definitely accommodate however, if the patient is in the middle of treatment encourage them to remain with the practice/practitioner until the treatment is finished. As those cases are a lot more complex to transfer.

Process

Patient calls requesting a transfer to another Dental Boutique clinic

1. If the patient is looking to attend different DB clinic due to relocation or similar for ongoing maintenance appointments. Email (Meg/Enquiries Team) *meg@dentalboutique.com.au* with the request. She will transfer all of the patient files and notify the clinician.
2. If the patient is in the middle of the treatment, encourage them to complete their treatment at your practice.
 - i. If the patient is unwilling, advise the patient that their enquiry will be passed onto your colleague to assist further.
 - ii. Email (Meg/Enquiries Team) *meg@dentalboutique.com.au* with the request. **Make sure patients information is all up to date including all the financials**
 - iii. If a request for transfer **is a complaint** regarding treatment or current treating clinician. Refer this to your practice manager/principal dentist. Refrain from giving specific time and/or date for the contact or call back but advise they will aim to contact as soon as possible.
 - iv. In some instances these requests will come through the "New Patient" line. In which case the process will begin straightaway, unless the transfer is of a complaint nature. In this instance the patient will be referred to the PM/PD for further management.

For Enquiries Team:

- If the transfer is **NOT** of a complaint nature i.e patient moving to a different location.

1) Book them an appointment at the new practice, choosing “Transferred” as a category, (this makes it easier to identify transferred patients in practice.)

****For sites using Principle. We have added Treatment Type tag: Transferred Patient***

The screenshot displays a patient profile for 'Test Test' with a 'Transferred' status. The 'Personal Details' section includes the following information:

- Card no: 12 6599 8888
- Title: ---Select title---
- Gender: Male Female Other
- Firstname*: Test
- Lastname*: Test
- Middle: Middle
- Preferred: Preferred
- Date of birth*: 01/01/1900
- First seen: First seen
- Category: Transferred

A 'Save Changes' button is located below the 'Category' field. The left sidebar contains navigation options: Overview, Details, Family, History, and Health fund. Financial summary shows 1 FTA, 3 TP, and \$0 Balance.

2) Transfer all of the clinical notes including treatment plan from old practice to the new one as well as any xray/OPG on file in the **attachment section**.

3) If the patient's old account is in credit. Note this as a comment in the **new file**

4) Notify the dentist you booked the patient in with advising that this is a transfer from another clinic giving them the name of the previous clinician. Advise the new clinician that if there is anything else they require they will need to contact the previous dentist. (*i.e extra-oral photographs which are only available on local drives*)