

Effective Communication and Record Sharing for Referred Patients

You might say we are a bit obsessed when it comes to the communication and exchange of patient records during the referral of a patient. However, it is this obsession that has enabled us to provide our patients with precise, problem-free treatments for over 18 years—no surprises, no disappointments, no upset patients, and no misunderstandings! How you ask? The answer is that we follow strict procedures when communicating treatment needs and share diagnostic records for every patient referred to us and vice versa.


Our commitment to following these procedures for every patient not only keeps patients happy, but also prevents the vast majority of dental and/or legal complications that can result from poor inter-office communication. Below are the communication procedures related to treatment needs and record sharing for referred patients that we have been following for years:

Patient's treatment needs

1. A request for a specific treatment is communicated via email, letter, or dentist-specific referral forms.
2. The letter, email, or referral form should be addressed specifically to the intended dentist or specialist.
3. The letter, email, or the referral form must contain:
 - Patient's first and last name
 - Date
 - Requested procedure with teeth marked or circled
 - Referring doctor's signature
4. This letter or form may be given to the patient to bring or send via email or faxed at time of referral.
5. A copy of the referral note should be kept in referring dentist's records.
6. If a referral form is more than 3 months old, a new form or letter should be sent since circumstances can change.

X-rays

1. Any available x-rays should be sent at time of referral; this will avoid additional x-rays and cost to the patient.
2. The x-ray must:
 - Should be within 6 months of patient's visit.
 - Contain the patient's full name and date taken.
 - Be of good diagnostic quality.
 - Show the intended tooth or area completely.
3. X-rays in film format should be sent as a duplicate but with good diagnostic quality.
4. Digital x-rays should be sent electronically via email. (see below on more information on server security and HIPAA compliant emails)
5. X-rays in printed format should be on high-quality photo paper.
6. X-rays printed on regular paper or faxed are not acceptable due to poor quality.
7. CBCT may be shared via a disc, USB flash drive, or drop box.

 The best practice is to send a referral form and available x-rays at time of referral. We recommend using our **online referral form (www.facialart.com/referral)** since **it is secure and provides a “triple copy” record to the patient, the referring dentist, and the referral**—all at the same time.

About HIPAA compliant emails:

- HIPAA compliant email servers are recommended whenever patient information is shared via an email
- Some host servers are highly secure but may not necessarily be HIPAA compliant which demands a certain level of encryption
- Gmail (google apps) is officially HIPAA compliant. If you use other services, check with your company.
- There is a company, emailpros.com, that does provide HIPAA compliant email accounts. I have not worked with them, but they offer monthly plans based on your needs.