

## **SENDING MEDICAL RECORDS TO OTHER VETERINARY FACILITIES**

*APPLIES TO ANY RECORDS BEING SENT TO OTHER VETERINARY FACILITIES - WHETHER FOR REFERRAL OR OTHER REASONS*

No member of the Healing Paws Veterinary Care staff is to forward in any manner medical records to another veterinary facility (email, snail mail, in person, etc) without following ALL of these steps.

### **OWNER REQUESTS MEDICAL RECORD BE SENT TO OTHER FACILITY**

*-Have not submitted a medical record request*

- tell them you will send out a form to request the record and that once it has been completed and received the records will be released within 5 days. *(If they are at another veterinary facility and want something right away, you are permitted to speak with the veterinary facility on the phone to give them vaccine reminders.)*
- Go into the patient's medical record, choose the "email client" blue quick link, and send the template "Records Request By Client". Press merge data to be sure everything fills in correctly.

*-Have submitted a medical record request*

- Upload the medical record request into CLIENT DOCUMENTS if for more than one pet, into PET DOCUMENTS if only for second opinion on one specific pet
- print the medical record request, write your first and last name, date, and time on what you have printed, and highlight the reason for the record request
- Place this paper in Dr. Sands' bloodwork box
- tasklist BOTH Dr Sands and Jessica Lambert AND MAKE A COMM LOG that there is a need to send records to another veterinary facility - state the facility, the patient, the reason, your name, time, and date in your tasklist
- Dr Sands will audit the chart and authorize sharing of the records/referral - this will be completed by her within 3 days so that the client can receive the chart within 5 days. Once audited she will tasklist CEC that the record is ready to release
- Client Experience Coordinator will send only the type of records permitted for release by the client only to the facility permission was given for release. This will be sent within 5 days of receiving the request.

### **REFERRAL - HPVC DOCTOR REFERS PATIENT FOR A PROCEDURE**

*-Client does not need to fill out a medical record request form*

- When referral is recommended, concierge/case manager must print the completed dr exam form from the time of the referral, highlight the reason and place for referral and place in Dr. Sands bloodwork box. Note if this referral needs submitted in less than 72 hrs please write URGENT on the paper and URGENT on the tasklist
- tasklist BOTH Dr Sands and Jessica Lambert AND MAKE A COMM LOG that there is a need to send records to another veterinary facility - state the facility, the patient, the reason, your name, time, and date in your tasklist
- Dr Sands will audit the chart and authorize sharing of the records/referral - this will be completed by her within 2 days so that the referral facility can receive the chart within 3 days. Once audited she will tasklist CEC that the record is ready to release
- Client Experience Coordinator will complete the referral form based on the referral protocol. This will be sent within 3 days of referral being recommended.