



## CNA HealthPro

### Sample Patient Termination Letters

The following fictitious scenarios discuss why a patient might be terminated and provide examples of letters that might be used to effect the termination. Please keep in mind that situations and information needs vary from patient to patient and dentist to dentist. The letters are not intended to be comprehensive, to constitute legal advice, or to determine what should or should not be written to a specific patient when a relationship has ended. What is important is that you make appropriate contact with the patient, based on your personality and your knowledge of the patient, and provide the patient with the required information. These examples can serve as a starting point if the need arises to draft your own patient termination letter.

#### Sample Letter: Case Scenario #1

One of the most common reasons for terminating a patient is for nonpayment of professional fees. In this example, repeated attempts to collect the outstanding account balance have been unsuccessful. The dentist does not wish provide further elective treatment. A letter such as the following might be appropriate:

Dear Patient,

We have contacted you a number of times regarding your outstanding balance with our practice. We have done so via monthly statements, telephone messages, and a personal letter. As much as we would like to continue to provide your care, we cannot do so under these circumstances. At this time, we have determined that we must terminate our dentist-patient relationship with you due to a lack of compliance with our practice's financial policies.

As of your last visit, our records indicate you had additional areas of decay that needed to be restored. I suggest that you make and keep an appointment with a new dentist as soon as possible to address these decayed teeth. Failure to seek examination and care could result in a serious worsening of your oral condition, including the potential for pain, infection, swelling, and/or tooth loss.

To provide a reasonable time for you to locate a new dentist, we will be available for the next 30 days to care for any emergency problems you might experience. Please call our office to schedule any necessary emergency appointment.

You can find a new dentist by calling the local dental referral service at 555-1212, or through the yellow pages advertising.

We will forward a copy of your dental records to you or to your new dentist upon receiving your signed, written request. Please allow four days from receipt of your request for duplication and mailing.

Sincerely,

Dr. Dentist

cc: Patient File

## Sample Letter: Case Scenario #2

Breakdowns in communication often result in the need to terminate a doctor-patient relationship. Perhaps you terminate the relationship because your patient has become unreasonably demanding, refused to accept your treatment recommendation, or your staff is simply uncomfortable working on and communicating with the patient. Or perhaps the patient stopped paying their bill. It is prudent for the dentist to send a letter to the patient indicating that the doctor-patient relationship is being terminated, what treatment remains, and how the dentist will handle the patient's dental record. The following is an example.

Dear Patient,

Over the course of your recent visits, I have frequently stated my objection to proceeding with your crowns and bridges without first treating your underlying periodontal disease. I provided you with written information about periodontal disease and have also spent time discussing your condition with you. Nonetheless, you have made it clear that you do not wish to have any periodontal therapy performed prior to your bridgework.

I believe that I can no longer meet your treatment expectations. Therefore, this letter is to inform you that I must discontinue my dentist-patient relationship with you. I will be available to treat any emergency you might have for the next 30 days, provided that you call my office beforehand to make an appointment.

You must seek the regular care of another dentist as soon as possible. You can find the name of a dentist in the telephone directory, or by calling the local dental association's referral service at 555-1212. You should choose either a general dentist who can provide periodontal therapy, or a dentist who specializes in periodontal therapy, called a periodontist, to treat your periodontal disease. Failure to seek examination and care could result in a serious worsening of your periodontal condition, or in further decay of your teeth. Advanced decay could result in the need for root canal therapy or tooth removal.

Once you have completed your periodontal therapy, you will need to have your upper teeth restored and replaced. This can be done by a general dentist or by a specialist in crowns and bridges called a prosthodontist.

I will send a copy of your dental record and x-rays to you or your new dentist if you will send a signed, written request and \$15.00 to cover the cost of duplication and mailing. I will need two days notice before I can send the records, but I will be happy to talk to your new dentist by phone at any time.

Sincerely,

Dr. Dentist

cc: Patient File

### Sample Letter: Case Scenario #3

A typical need for termination occurs when a patient misses repeated recall appointments. In this example, 18 months have passed and the patient has missed multiple recall appointments. He has been advised by telephone of the consequences of further missed appointments, yet he fails again. The dentist determines that it is in the best interest of the patient and the practice that the relationship be terminated. A letter such as the following might be appropriate:

Dear Patient,

Over the past 18 months we have scheduled five recall visits for you, but you have yet to make it to our office. We have left you three messages in the last month to discuss this with you, but you have not returned our telephone calls. As much as we would like to continue to provide your care, we cannot do so under these circumstances. Therefore, this letter is to inform you that we must end our dentist-patient relationship with you.

To provide a reasonable time for you to locate a new dentist, we will be available for the next 30 days to care for any emergency problems you might experience. Please call our office to schedule any necessary emergency appointment.

You can find a new dentist by calling the local dental referral service at 555-1212, or through the yellow pages advertising. We will forward a copy of your dental records to you or to your new dentist upon receiving your signed, written request, accompanied by a payment of \$10.00 to cover the costs of duplication and handling. Please allow four days from receipt of your request for duplication and mailing.

As of your last visit our records indicate that you had moderate periodontal (gum) problems, which should be evaluated as soon as possible. There were no other oral health problems apparent at your last visit, but 18 months have passed since then. I suggest that you make and keep an appointment with a new dentist as soon as possible. Failure to seek examination and care could result in a serious worsening of your periodontal condition, or of any dental problem that might exist.

Please feel free to contact me if you have any questions about your oral health or about finding a new dentist. If we do not hear from you in the next 30 days, we will assume that you have sought dental care from another practice.

Sincerely,

Dr. Dentist

cc: Patient File

#### Sample Letter: Case Scenario #4

While the general rule is *not* to terminate a relationship with a patient who is not in stable condition, sometimes it is necessary when the patient fails to show up for completion of treatment. For example, a new patient presents for emergency root canal therapy. You open the tooth, remove the pulpal tissue and place a medicament and a temporary restoration. The patient, now out of pain, refuses to return for the filing, cleansing, obturation and restoration of the tooth. The patient's only visit to your office was for the emergency root canal. The following is a typical termination letter.

Dear Patient,

Over the last four weeks my staff and I have tried repeatedly to contact you by phone and by mail to schedule appointments to complete the emergency root canal treatment I began for you on June 6. We have not received a response to any of our calls or letters. At your emergency visit, and in our phone calls and letters to you, we informed you that failure to complete the root canal treatment could result in serious problems for you, such as a severe infection and/or the loss of that tooth. Even so, you have failed to make or keep any subsequent appointments.

Therefore, this letter is to inform you that I am now terminating my dentist-patient relationship with you. I will be available to treat any emergency you might have related to this root canal treatment for the next 30 days, provided that you call the office to make an appointment and are prepared to pay for the treatment at the time of service. You must seek the regular care of another dentist as soon as possible. You can find the name of a dentist in the telephone directory, or by calling the local dental society referral service at 555-1212. Choose either a general dentist who can provide root canal therapy, or a dentist who specializes in root canal therapy, called an endodontist.

Once you have completed your root canal, you will need to have that tooth restored. In addition, you should seek care for any other dental problems you might have. I did not complete a comprehensive examination of your oral health at the time of your emergency visit, having agreed with you to wait until I completed this root canal emergency. This comprehensive exam should be completed as soon as possible by your new dentist.

I will send a copy of your dental record and x-rays to you or your new dentist if you will send a signed, written request for the records. I will need two days notice before I can send the records, but I will be happy to talk to your new dentist by phone at any time.

Sincerely,

Dr. Dentist

cc: Patient File

## Sample Letter: Case Scenario #5

Many dentists have records of “inactive patients,” patients that they have not seen or treated in years, but with whom there has been no formal termination of relationship. While most of these patients have likely sought care from another dentist, those that have not may still be considered a patient of the “current” dentist—even if they haven’t responded to that dentist’s recall requests. Therefore, a prudent dentist will find these “inactive patients” and contact them to either continue treatment or terminate the relationship. The following is a sample of a letter that may meet this need.

Dear Patient,

It has been quite a while since your last visit to our office. We have tried to contact you by telephone and by mail, but have not received a response to our requests that you schedule a recall appointment. We would be glad to see you again to assess your dental needs. Please call our office and Kathy will schedule another appointment for you. If we do not hear from you within the next 30 days, we will assume that you have chosen to be treated elsewhere and will consider our dentist-patient relationship with you to be terminated.

Our records indicate that you had no oral health problems apparent at your last visit, but three years have passed since then. We are hopeful that you have sought regular dental care elsewhere during this period. If not, we strongly suggest that you make an appointment as soon as possible with us, or with another dentist. Failure to seek examination and care prevents the chance to diagnose and treat any dental problem that might exist.

If you have not already made arrangements to be treated elsewhere, we will be available for the next 30 days to care for any emergency problems you might experience. We ask that you please call our office to schedule any necessary emergency appointments.

If you choose not to return to our office for care, you can find a new dentist by calling the local dental referral service at 555-1212, or through the yellow pages advertising. We will forward a copy of your dental records to you or to your new dentist upon receiving your signed, written request. Please allow four days from receipt of your request for duplication and mailing.

Thank you for your attention to this matter. We hope to see you again soon!

Sincerely,

Dr. Dentist

cc: Patient File

## Sample Letter: Case Scenario #6

Some patients referred through managed care plans may have never established long-term dentist-patient relationships and need to be specifically guided through your office protocol regarding broken appointments. You inform them about the need to keep appointments, but the behavior of breaking or failing appointments persists. After discussing the situation with the managed care organization (MCO) and evaluating your contractual relationship with the MCO, you still feel the need to terminate the relationship. The following is a sample of a letter that may meet this need.

Dear Patient:

It has come to our attention that since your initial visit to this office on May 16, you have canceled or broken four appointments. We therefore have not been able to begin your treatment plan, which consists of periodontal (deep cleanings with anesthetic) and restorative (fillings) procedures.

Since it appears that we will not be able to take care of your dental needs in a timely fashion, this letter is to inform you that we must end our dentist-patient relationship with you as of this date.

We have contacted your managed care organization and requested that they transfer you to another dental office in their system. We will be happy to transfer your records to that dentist upon receipt of a signed, written request from you.

Your transfer will be effective in 30 days, during which time this office is available for emergencies. If the need arises, please call our office during that period.

We would encourage you to make and keep an appointment with the new dentist as soon as possible, as your periodontal (gum) disease and tooth decay (cavities) are conditions that are likely to progress without timely treatment.

Sincerely,

Dr. Dentist

cc: Patient File

Managed Care Company

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