



# Transfer of Care Policy

## Purpose

This policy provides a consistent and safe framework for the transfer of care between Aurum Health and other healthcare providers. It ensures clinical continuity, client safety, and respect for privacy and autonomy across all transitions, whether temporary (e.g., during clinician leave) or permanent (e.g., upon client request).

## Scope

This policy applies to all clinicians and administrative staff at Aurum Health involved in coordinating or actioning the transfer of care to or from:

- Other general practices
- Specialist or secondary care providers
- Allied health or community services
- Emergency and after-hours care

## Policy Statement

The transfer of care process is guided by the following principles:

- **Client-Centred:** Transfers are led by client preference and consent.
- **Safe and Timely:** Relevant information is shared promptly and securely.
- **Respectful:** Clinicians communicate with mutual professionalism and courtesy.
- **Confidential:** All information is shared by the governance of the following legal frameworks and practices:
  - Health Practitioners Competence Assurance Act 2003
  - Privacy Act 2020
  - Health (Retention of Health Information) Regulations 1996
  - Health and Disability Commissioner Code of Rights
  - Health Information Privacy Code 2020

## Definitions (if needed/abbreviations are used)

**Transfer of Care:** When there is a handover of clinical information exchanged between clinicians. This can be internally within Aurum, or to an external clinician that has the appropriate authority and need to know the information.

**PMS:** Patient Management System. Aurum uses Indici.

## Procedures

Transfers may occur in the following circumstances:

- Client relocation or request to change providers
- Referral to specialist or allied health service
- Hospital admission or discharge
- Clinician resignation, leave, or service conclusion
- Clinical handover following urgent or after-hours care

## Client Consent

Transfers of care require documented client consent unless initiated for emergency or safety-related reasons. Consent includes agreement to share health records with the receiving provider. Clients are informed of their right to request a copy of their own records.

## Transfer Process

### Outgoing Transfers (from Aurum Health)

The clinician or relationship manager confirms the request and obtains consent. A complete, legible clinical summary is generated, including:

- Medical history, diagnoses, and current medications
- Relevant recent test results
- Care plans and significant consultations
- Details of any outstanding investigations or referrals

The summary is securely sent to the receiving provider via approved channels (e.g., encrypted email or secure PMS-to-PMS transfer).

A note is made in the client's Aurum record indicating the date and details of transfer.

### Incoming Transfers (to Aurum Health)

The relationship manager requests the client's previous health summary upon registration. The incoming summary is reviewed by the primary clinician before or during the first consultation. Any gaps in information or clarification needs are followed up with the previous provider. The client's health record is updated and reconciled appropriately.

### Urgent or Unplanned Transfers

In the event of an emergency or sudden clinician unavailability:

- The Clinical Director or delegate arranges interim care and notifies the client.
- An immediate handover is documented and shared with receiving clinicians.
- The client is followed up to ensure continuity and understanding of the change.

### Records and Retention

All transfer-related documentation is retained in line with:

- Health (Retention of Health Information) Regulations 1996 (minimum of 10 years from last care interaction)
- Internal audit and risk management procedures

## Audit and Quality Improvement

Regular audits of care transfers are conducted to ensure documentation completeness, timeliness, and client satisfaction.

## Responsibilities

**Clinical Director:** Provides oversight and leadership of all clinical matters. This includes review of incidents, continuous improvement and management and recommendations for clinical operation of Aurum Health Limited.

**Relationship Managers:** Liaise between clients and clinicians, ensuring continuity, documentation, and feedback are upheld to Aurum standards.

## Related Documents

Client Privacy and Data Care Policy

Scope of Care Policy

Clinical Governance Policy

## Document Control

Aurum Health Limited schedules regular reviews for Policies. However, we also take a proactive approach to policy maintenance based on learning, best practice and feedback. Because of this, be sure to regularly familiarise yourself with our policy set to ensure that you are aware of the most recent version. Do not rely entirely on the review date planned, as a new version may already be available.

This Policy is only current if it has been opened directly from SharePoint. Downloading and printing this Policy risks it being used when it is out of date. Therefore, with any offline version, please ensure that you check for the current policy online when using it for decision-making or reference.