

Terminating a Provider–Patient Relationship

Healthcare providers have the right to treat the patients they wish to treat and to terminate relationships with patients for various reasons (e.g., nonadherence to treatment, disruptive behavior, frequently missed appointments, etc.). However, providers should use caution when discharging patients from their care. Before taking action, review the patient's record to ensure it contains adequate, objective, and factual documentation that supports the decision to end the relationship. Further, to avoid allegations of abandonment, make sure you follow your organization's formal process for ending a relationship with a patient.

This checklist contains considerations for terminating provider-patient relationships. After using the tool, think about your answers in relation to the guidance and recommendations in MedPro's [Terminating a Provider-Patient Relationship](#) guideline. Additionally, consider consulting your professional liability company and/or legal counsel if you have questions or concerns.

| | Yes | No |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| <i>Regulatory, Contractual, and Professional Standards</i> | | |
| Does the state, or states, in which you practice have specific regulations related to terminating provider-patient relationships? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you verified whether any contractual obligations (e.g., through a managed care organization, health maintenance organization, or preferred provider organization) require the continued provision of care or compliance with specific actions prior to terminating a relationship with a patient? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does your healthcare organization have a formal, written policy for terminating provider-patient relationships that incorporates state, federal, and/or contractual obligations? | <input type="checkbox"/> | <input type="checkbox"/> |

| | Yes | No |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| <i>Behavioral and Financial Considerations</i> | | |
| Has the patient repeatedly refused to obtain needed screening or treatment? | <input type="checkbox"/> | <input type="checkbox"/> |
| Has the patient made complaints or accusations against the practice, made inappropriate remarks, or displayed threatening or inappropriate behavior? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do behavioral issues or personality differences prevent you and the patient from working together as a team? | <input type="checkbox"/> | <input type="checkbox"/> |
| Is the reason for terminating the provider-patient relationship due to nonpayment of bills? If yes: <ul style="list-style-type: none"> • Have you determined whether any contractual obligations require the continued provision of care? • Is the patient undergoing active treatment? • Have attempts been made to establish a payment plan, and has the patient been given ample opportunity to adhere to the payment plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered using a patient agreement to help preserve the provider-patient relationship? | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Clinical Considerations</i> | | |
| Is the patient at a critical juncture in, or in the midst of, treatment (such as chemotherapy or dental work)? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are there geographical or clinical specialty issues that may prolong the patient finding appropriate alternative care (e.g., you are located in a rural area or are the sole practitioner of a certain specialty in your area)? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does termination of the provider-patient relationship apply to only one clinician/location or across the entire practice/group (e.g., for large group and multisite practices)? | <input type="checkbox"/> | <input type="checkbox"/> |

| | Yes | No |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| <i>Documentation</i> | | |
| Have you consistently documented treatment recommendations and warnings to the patient about possible negative effects of nonadherence to treatment? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does the patient’s health record contain documentation of the patient receiving instructions and education related to care and treatment? | <input type="checkbox"/> | <input type="checkbox"/> |
| Does documentation objectively note provider and staff attempts to resolve the problems or address the issues? | <input type="checkbox"/> | <input type="checkbox"/> |
| Has inappropriate or threatening behavior by the patient been documented objectively in the health record (using quotation marks where relevant to preserve the patient’s actual statements)? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have all appointment cancellations and no-shows been documented in the patient’s health record as well as staff attempts to follow up with the patient and reschedule appointments? | <input type="checkbox"/> | <input type="checkbox"/> |

This document does not constitute legal or medical advice and should not be construed as rules or establishing a standard of care. Because the facts applicable to your situation may vary, or the laws applicable in your jurisdiction may differ, please contact your attorney or other professional advisors if you have any questions related to your legal or medical obligations or rights, state or federal laws, contract interpretation, or other legal questions.

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