



# 5 Components of Effective Hand-offs

1

## **Patient Name**

Introduce (or RE-introduce) patient to next team member, using patient name.

2

## **Current Situation**

Briefly tell team member the current patient situation, their need, why they are there.

3

## **Something Personal and/or Relevant**

Share something relevant or timely that the patient has shared that could affect treatment timing (i.e., wedding, graduation, new job).

4

## **Next Step**

State service that next team member will provide (i.e., x-ray, Dr evaluate, filling).

5

## **Team Praise**

Assure patient of next team member stellar ability for patient care (i.e., “You are in great hands. Sue is our expert at maximizing insurance benefits, caring for our patients”).

*Pick a partner and role-play what a good hand-off would sound like:*

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*An effective patient hand-off enhances patient rapport with the entire team, which further increases the possibility of the patient accepting your treatment recommendations.*



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