

Te Whatu Ora Health New Zealand Hauora a Toi Bay of Plenty CLINICAL PRACTICE MANUAL	REQUEST TO CHANGE CLINICIAN - MENTAL HEALTH & ADDICTION SERVICES	Protocol CPM.M5.4
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PURPOSE

It is the Te Whatu Ora – Health New Zealand Hauora a Toi Bay of Plenty Mental Health & Addiction Service's (MH&AS) protocol intent that tāngata whai ora / service users are accorded the right to request a change of clinician.

OBJECTIVE

To try and accommodate the provision of an alternative provider if possible, dependent on workforce availability. Notwithstanding existing geographical boundaries identified in order to manage resource distribution, in the interest of tāngata whai ora / service user requests, MH&AS will not allow this to impede tāngata whai ora / service user choice in regard to a change of clinician.

SCOPE

This protocol applies only to a tāngata whai ora / service user's request to change their clinician within the MH&AS.

EXCLUSIONS

Routine changes of clinician or case manager within the same service unit such as:

- differing assessment or treatment needs.
- change in the tāngata whai ora / service user's address.
- staff turn-over, leave or sickness

Transfers of Care between MH&AS units should be handled as per [policy 6.1.2 protocol 6 Transfers of Care to Other DHB or External Service](#)

STANDARDS TO BE MET

	ACTION	RATIONALE
1	<ul style="list-style-type: none"> • The tāngata whai ora / service user will be advised to put the request in writing, addressed to either: <ul style="list-style-type: none"> – The Clinical Director / DAMHS for changes of Responsible Clinician (RC) or Senior Medical Officer (SMO). – The Team Leader of the specific service for changes of Case Manager. • Any staff member who receives a verbal request is to assist the tāngata whai ora / service user and put the request in writing to the Quality & Patient Safety Co-ordinator for referral to the appropriate authority. 	<ul style="list-style-type: none"> • To provide an auditable trail. • Requirement of the MHA (1992) Section 7 • For consumers subject to the MHA (1992) a copy of request is forwarded to the DAMHS as soon as received.

Issue Date: Apr 2023 Review Date: Apr 2025	Page 1 of 4 Version No: 5	NOTE: The electronic version of this document is the most current. Any printed copy cannot be assumed to be the current version.
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	ACTION	RATIONALE
	<ul style="list-style-type: none"> Staff members should access appropriate supports to facilitate tāngata whai ora / service user's request i.e. interpreter services including access Te Reo Māori, referrals for Te Pou Kōkiri A copy of the request is placed in the tāngata whai ora / service user's file. 	
2	Requests to change (Senior) Medical Officer <ul style="list-style-type: none"> The decision is made by the SMOs in conjunction with the Clinical Director / DAMHS as to the outcome of the request. The Clinical Director / DAMHS relays the outcome of the request to change SMO / RC to the tāngata whai ora / service user making the request. <p>Note: Consider MDT recommendations incl. Te Pou Kōkiri / interpreter assessments.</p>	This may include: <ul style="list-style-type: none"> Request to change clinician is granted Decision or review is deferred until a defined time, e.g. following discharge from the ward. No change Tāngata whai ora / service user is discharged from the service.
3	Requests to change Case Manager <ul style="list-style-type: none"> The Team Leader of the tāngata whai ora / service user's treating team will ensure that the request for a change of clinician process is initiated as soon as possible and completed within 20 working days. This will also include informing the appropriate staff member of the request to change and consideration of the clinical feasibility for the tāngata whai ora / service user to have the change of clinician occur. 	<ul style="list-style-type: none"> Responsiveness.
4	<ul style="list-style-type: none"> The Team Leader ensures that discussions take place in which the tāngata whai ora / service user is able to articulate their reasons for the request. This should involve feedback from: <ul style="list-style-type: none"> The tāngata whai ora / service user, The existing clinician, An advocate or support person (if requested by tāngata whai ora / service user) A record of the decision and reason for it is documented in the tāngata whai ora / service user's file. The tāngata whai ora / service user will also have explained that, while they may have requested a change to an alternative clinician, this will not necessarily be granted and that any decision will take a number of factors into consideration. 	<p>To:</p> <ul style="list-style-type: none"> Discuss the reasons for the request. Attempt to diffuse tāngata whai ora / service user-concerns / anger / frustration Discuss the possible implications of any change of clinician <p>These implications could include:</p> <ul style="list-style-type: none"> a break in continuity of care the request is made as part of the tāngata whai ora / service user being unwell difficulties arise in the context of a multi-disciplinary model of care communication problems which may arise. (It is suggested that tāngata whai ora / service users having clinical staff in different teams does not support communication and often leads to inferior care.)

Issue Date: Apr 2023 Review Date: Apr 2025	Page 2 of 4 Version No: 5	NOTE: The electronic version of this document is the most current. Any printed copy cannot be assumed to be the current version.
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	ACTION	RATIONALE
		<ul style="list-style-type: none"> who might assume care for the tāngata whai ora / service user and what impact does that have on an alternate clinician
5	<ul style="list-style-type: none"> If the decision is made to grant the request to change clinician, then the Team Leader, in consultation with the clinicians involved, decides: <ul style="list-style-type: none"> which other clinician / team will take up responsibility for the care of the consumer, and; the timing of transfer of care, which may involve consultation with all parties. 	<ul style="list-style-type: none"> This will be done in a way that balances practical considerations with fairness to each of the teams.
6	<ul style="list-style-type: none"> The Team Leader (or delegate) notifies the tāngata whai ora / service user of the outcome of their request to change Case Manager. 	<ul style="list-style-type: none"> To ensure consistency of information sharing. To provide an auditable trail.
7	<ul style="list-style-type: none"> Once the new Clinician / team has been identified and has accepted the transfer of care for the tāngata whai ora / service user, then: <ul style="list-style-type: none"> A decision letter is sent to the new clinician / team and copy filed in tāngata whai ora / service user's file. The transferring clinician completes the Transferring an EOC procedure in the WebPAS patient information system Formal transfer of care from clinician to clinician takes place and is documented in the tāngata whai ora / service user's file. For Individuals subject to the Mental Health Act, a Transfer of Responsible Clinician form is completed and filed in the tāngata whai ora / service user's file. 	<ul style="list-style-type: none"> To ensure consistency of information sharing. To provide an auditable trail.
9	<ul style="list-style-type: none"> If the request for a change of clinician cannot be resolved after following the above processes the Clinical Co-ordinator / Team Leader shall involve the Clinical Director and / or DAMHS in the matter. 	<ul style="list-style-type: none"> Resolution

REFERENCES

- Ngā Paerewa Health & Disability Service Standards NZS 8134:2021
- Alcohol & Other Drug Treatment Sector Standards NZS 8157:2003
- Mental Health (CAT) Act 1992

Issue Date: Apr 2023 Review Date: Apr 2025	Page 3 of 4 Version No: 5	NOTE: The electronic version of this document is the most current. Any printed copy cannot be assumed to be the current version.
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ASSOCIATED DOCUMENTS

- [Te Whatu Ora Hauora a Toi Bay of Plenty policy 6.1.2 Medical Responsibility for Patient Care](#)
- [Te Whatu Ora Hauora a Toi Bay of Plenty policy 6.1.2 protocol 6 Transfers of Care to Other DHB or External Service](#)
- [Te Whatu Ora Hauora a Toi Bay of Plenty Transfer of Care Between Responsible Clinicians Form](#)

Issue Date: Apr 2023 Review Date: Apr 2025	Page 4 of 4 Version No: 5	NOTE: The electronic version of this document is the most current. Any printed copy cannot be assumed to be the current version.
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