Ref TRF-001 | Version 1.0 | Reviewed June 2026

TRANSFERS

Transferring records out

Transfer a patient's records out promptly and lawfully when they move to another practice, within the expected timeframe and without withholding records over a debt.

Who it is for: Reception and admin staff handling a transfer-out request.

You will need: The transfer request, the patient's details, and your practice management system.

The steps

1. Confirm the request is genuine and identify the patient correctly by name, date of birth and NHI. If it did not come through your usual channel, route it there first.
2. Log the request in **[your transfer record]** and attach it to the patient's notes.
3. Send the record by GP2GP. Send any old paper notes to the new practice by tracked courier.
4. Record how and when the notes were sent, both in the patient's notes and in **[your transfer record]**.
5. Update the patient's status: inactivate the record, suspend their patient portal access, and remove them from enrolment so funding and recalls are correct.
6. Aim to send within 10 working days, the expected timeframe for a record transfer.

Sending the notes in Medtech

1. Open Tools, then GP2GP Patient Record Export.
2. Enter the receiving GP and practice details from the request.
3. In patient demographics, make sure every section is selected for export, then export. If the file is very large, send it in two parts.
4. When prompted, inactivate the patient, then file the record.

> **WATCH OUT**
> Never withhold or delay a transfer because the patient owes money. You can still try to recover a debt, but the records must go. A transfer is never held hostage to an account.