



Closing Your Practice Worksheet

When a physician makes the decision to close their practice, providing notice in a timely manner is imperative to ensure continuity of patient care, avoid allegations of abandonment, and fulfill contractual and regulatory obligations. The process should begin at least ninety (90) days prior to the anticipated closure.

This checklist includes but is not inclusive of, all tasks that need to be completed prior to closure. Assigning responsibility for each task with a due date will ensure that all necessary tasks are completed according to schedule.

Tasks/Notification	Assigned to	Due Date	Completed	Notes
Tasks				
Draft an agreed-upon statement regarding departure.				
Review obligations you will need to fulfill regarding your staff with your attorney.				
Stop accepting new patients. If a specialty office, determine the last day for procedures. Ensure that follow-up time is built into the closure date selection.				
Contact your malpractice insurer and assess if tail coverage is needed.				
Notifications				
Staff: Notify of departure using the guidance from your attorney				
Develop a letter to patients and a notice to the public. Include: <ul style="list-style-type: none"> • Date office will close • Medical record release authorization • List of all practices accepting new patients 				

Send notification to all active patients. This should occur at a minimum of 90 days prior to closure. The letter should include how to transfer the medical record.				
Implement a follow-up plan for high-risk patients. This should occur at a minimum of 60 days prior to closure.				
Post signage regarding departure in the waiting area and all exam rooms.				
Family Practice: Post an advertisement in the local newspaper and on social media regarding departure/closure. This notice should run a few weeks in a row.				
Specialty Practice: Post an advertisement in regional newspapers and on social media regarding departure/closure. This may be in several newspapers, depending on the region the practice covers. This notice should run a few weeks in a row.				
Notify all entities, companies, and suppliers the provider may have contracts with.				
Medical Records				
Document your notifications/follow-ups.				
Notify your medical records custodian.				
Implement a retention process.				
Transfer medical records to a storage facility.				
Determine how record requests will be routed once the office closes.				
Physician Notifications				
State licensing board.				
State and local medical societies.				
Drug Enforcement Administration (DEA).				
Medicare.				
Medicaid.				
Third-party payers and managed care (for credentialing purposes)/insurance companies.				
Professional associations with whom you are a member.				
Malpractice insurance.				
Ancillary services (lab, X-ray).				
Colleagues and associates.				
Medications				

Samples returned to rep/destroyed.				
Follow federal guidelines for controlled substances (DEA).				
Plan for handling requests for medication refills.				
Post-Provider Departure Considerations				
Final follow-up for patient notification of those patients who have not responded (high risk).				
Answering service alerting callers of the provider's departure and directing them to providers who will or may accept the patient.				
Routing of lab tests or other procedures that are outstanding and require addressing.				
Determine responsibility and conduct hand-off for medication refill requests.				

References:

AAFP (2020). [Starting, Closing, or Selling a Practice: Starting, Closing, or Selling a Practice | AAFP](#)

Barnard, Esq., J., MacLean, Esq., A., & Sampson, IPDY, K. (2014). Physician's Guide to Closing A Practice. Maine Medical Association. DOI: [Physician's Guide To Closing A Practice \(mainemed.com\)](#)

American Medical Association AMA (2018). 4 must-dos before physicians retire. DOI: [4 must-dos before physicians retire | American Medical Association \(ama-assn.org\)](#)

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