

**Closing Your Practice Worksheet: Start 90 days before anticipated closure**

Tasks/Notifications	Responsibility	Due Date	Completed
<b>Practice/Hospital</b>			
Agreed statement regarding departure			
Stop accepting new patients			
Staff Notification <ul style="list-style-type: none"> <li>• Review obligations</li> </ul>			
Develop letter to patient, notice to public, include date office will close; (SEE PHYSICIAN'S GUIDE TO CLOSING A PRACTICE, BY THE MMA)			
Notification of Patients <ul style="list-style-type: none"> <li>• High risk</li> </ul>			
Notification of Patients <ul style="list-style-type: none"> <li>• Active</li> </ul>			
Identify providers whose patients can be referred for continuity of care: high risk			
Records release available			
Post notification of departure in waiting area			
Public – newspaper advertisement of departure (several times, few weeks in a row)			
Public – newspaper advertisements: for specialist in a region, may involve more than one paper			
Notify malpractice insurance, other insurances, policies			
Contracts provider may have with other entities or suppliers <ul style="list-style-type: none"> <li>• Notification requirements with change in status</li> </ul>			
Medical Records <ul style="list-style-type: none"> <li>• Retention</li> <li>• Notifications/follow-up</li> </ul>			

Tasks/Notifications	Responsibility	Due Date	Completed
<ul style="list-style-type: none"> <li>• Custodian</li> <li>• Transfer to storage facility</li> </ul>			
Destroy all prescription pads with the provider's name, and letterhead last day			
Determine who will handle medication refills as prescribed by the provider if not handled by the practice			
Determine how records request will be routed, storage and retrieval			
Medications <ul style="list-style-type: none"> <li>• Samples returned to rep/destroyed</li> <li>• Follow federal guidelines for controlled substances (DEA)</li> </ul>			

<b>Physician: Notifications to -</b>			
State licensing board			
State and local medical societies			
Drug Enforcement Administration (DEA) <ul style="list-style-type: none"> <li>• Return license</li> </ul>			
Medicare			
Medicaid			
Third-party payers and managed care – (for credentialing purposes)/health insurance companies			
Professional associations with whom you are a member			
Colleagues and associates			
Tail coverage			
Ancillary services (lab, x-ray)			
Stop surgeries: establish end date so follow-up can be completed by practice			

Tasks/Notifications	Responsibility	Due Date	Completed
(Determine how far in advance surgeries will stop, factor in follow-up visits).			
Alert the surgery department and office staff of last book date.			
<b>Post-Provider Departure Considerations</b>			
Continued patient notification for those patients who have not responded (high risk).			
Answering service alerting callers of the provider departure and directing to providers who will or may accept the patient.			
Determine responsibility: Routing of lab tests or other procedures that are outstanding and require addressing.			
Medical record storage and access to record requests.			
How medication refills will be handled.			