

Checklist:

CLOSING A MEDICAL PRACTICE

TIMEFRAME	ACTIONS
6 months prior to closure	<ul style="list-style-type: none"> <input type="checkbox"/> Post an announcement in your office. <input type="checkbox"/> Instruct staff to communicate with patients during calls and appointments. <input type="checkbox"/> Check your state's mandates with regard to storing and releasing Patient Charts to the appropriate parties. <input type="checkbox"/> Begin research on available options for handling patient records and services that offer Medical Records Custodian Services.
3 months prior to closure	<ul style="list-style-type: none"> <input type="checkbox"/> Notify patients by letter and enclose a records release authorization form for patients who are currently undergoing treatment or, who were seen by the practice within the last 2 years. <input type="checkbox"/> Consider calling each patient that has a chronic or complicated medical condition. Follow up with a letter advising them that their condition requires ongoing medical attention and that a physician must be selected to provide for their continuing care. <input type="checkbox"/> Place a notice in at least two area papers serving your patient population. If you are a specialty physician and see patients throughout your state, it is in your best interest to utilize periodicals that circulate state-wide. <input type="checkbox"/> Choose a Medical Records Custodian Services provider. <input type="checkbox"/> Inform patients how medical chart requests will be handled once your practice is closed.
Following a closure	<ul style="list-style-type: none"> <input type="checkbox"/> Place a message on the practice's voicemail service instructing patients about the closure. Include the following information in the message: <ul style="list-style-type: none"> • Date office closed • Information about how patients can: <ul style="list-style-type: none"> ○ Find new providers ○ Request copies of medical records ○ Obtain emergency treatment