### Notifications (60 to 90 days prior to closing).

- **STAFF**
  - Organize a staff meeting to notify employees of practice closure.
  - Prepare to hire temporary staff if current employees leave prior to closing date.

- **PATIENTS**
  - Prepare and send notification to patients listing the closing date and reason for closing.
  - Include an authorization form to transfer medical records to your patients’ new providers.
  - Place a dated copy of the notification in each patient’s medical record.

- **THE PUBLIC**
  - Publish local newspaper ads with details about the closing.
  - Post signage in your office to notify visitors of your last day of business.

- **PROFESSIONAL ASSOCIATIONS**
  - Notify your state medical board, licensing board, credentialing organizations, professional memberships, etc.

- **DRUG ENFORCEMENT AGENCY (DEA)**
  - Inform the DEA of your wishes to either continue or surrender your DEA registration.

- **HEALTH INSURANCE COMPANIES**
  - Inform all contracted payers of your intent to close your practice.
  - Provide payers with a forwarding address to send payments that resolve after the office closes.

- **HOSPITALS**
  - Notify the hospitals where you have privileges of your intention to close your practice.

- **ANCILLARY SERVICES**
  - Contact ancillary services such as labs, MRI facilities, etc. that you refer patients to.

- **SUPPLIERS/SERVICE CONTRACTS**
  - Inform medical suppliers, office suppliers, collection agencies, laundry services, housekeeping services, hazardous waste disposal services, magazine subscriptions, etc.
  - Request final statements from these vendors to close your accounts with them.

- **OTHER PHYSICIANS**
  - Let the colleagues that you work with, or refer to, know of your decision to close.

- **UTILITIES**
  - Notify all utility service providers of the day you wish to discontinue service.

### Tasks (30 to 60 days prior to closing).

- **PATIENT SCHEDULING**
  - No new patients should be accepted once the closing date is announced.
  - Start restricting nonemergent appointments as much as possible.
  - Patients who need continual follow-up and care should be referred to another provider.

- **ACCOUNTS RECEIVABLE**
  - Process your accounts receivable, as much as possible, to collect money owed to you.
  - Consider employing a collection agency or staff member to reconcile accounts after the practice has closed.

- **INSURANCE POLICIES**
  - Review your and your employees’ insurance policies and update or cancel where appropriate: i.e., liability, health, life, disability, workers compensation, etc.
  - Obtain tail coverage extended liability insurance if necessary, which provides coverage against claims reported after the liability policy expires.

- **MEDICAL RECORDS**
  - Arrange for safe storage for both paper and electronic medical records.
  - Notify your state medical board of the storage location.
  - Determine the correct amount of time your medical records should be stored, as defined by your state law.
  - Make sure the storage facility has experience handling confidential patient information and HIPAA agreements.
  - Establish a mailing address or PO Box for medical record requests after closing.

- **CLINIC DOCUMENTS & EQUIPMENT**
  - Arrange for storage of personnel records according to your state law.
  - Organize the disposal or proper storage of clinic documents such as financial records, patient education materials, brochures, etc.
  - Plan to sell or lease office and medical equipment, if appropriate.

- **MEDICATIONS**
  - Follow the federal guidelines for disposing of prescription drugs and medications.
  - Contact drug representatives to determine what to do with unused samples, if applicable.
  - Destroy all prescription pads.

- **PHONE SERVICE**
  - Consider using an answering service or prepare messaging for office phone calls after the closing date.

- **MAIL SERVICE**
  - Contact the U.S. Postal Service to coordinate mail forwarding details.

Contact an accountant and attorney for specific business and legal advice when closing a medical practice.