



Facility Closure Checklist - Medical Facility

16 Jun 2023 / Matt Andrews

Complete

Score	67.57%	Flagged items	0	Actions	1
Facility Name	Health Medical site A				
Conducted on	16.06.2023 14:00 PST				
Prepared by	Matt Andrews				
Location	2541 White Rd, Irvine, CA 92614, USA				

Actions

1 action

Closure Checklist / Notifications - 60 to 90 days before closing

Organize a staff meeting to notify employees of practice closure

Not Yet Done

Complete | Assignee SafetyCulture Staff | Priority Low | Due 23.06.2023 14:03 PST | Created by SafetyCulture Staff

Hello Shine! Please schedule a staff meeting for tomorrow. We need to inform everyone of our site's closure next year.

Closure Checklist

1 action, 67.57%

Notifications - 60 to 90 days before closing

1 action, 58.82%

Staff

Organize a staff meeting to notify employees of practice closure

Not Yet Done

Complete | Assignee SafetyCulture Staff | Priority Low | Due 23.06.2023 14:03 PST | Created by SafetyCulture Staff

Hello Shine! Please schedule a staff meeting for tomorrow. We need to inform everyone of our site's closure next year.

Prepare to hire temporary staff if current employees leave prior to closing date

Done

Temporary staff hired and onboarded.

Patients

Prepare and send notification to patients listing the closing date and reason for closing

Not Yet Done

Patients to be informed right after the employees are made aware during the meeting.

Include an authorization form to transfer medical records to your patients' new providers

Done

Place a dated copy of the notification in each patient's medical record

Done

Public

Publish local newspaper ads with details about the closing

Not Yet Done

I will prepare the ad after the staff meeting.

Post signage in your office to notify visitors of your last day of business

Not Yet Done

Professional Associations

Notify the state medical board, licensing board, credentialing organizations, professional memberships, etc

Done

Drug Enforcement Agency (DEA)

Inform the DEA of your wishes to either continue or surrender your DEA registration

Done

Health Insurance Companies

Inform all contracted payers of your intent to close your practice	Done
Provide payers with a forwarding address to send payments that resolve after the office closes	Done
Hospitals	
Notify the hospitals where you have privileges of your intention to close your practice	Done
Ancillary Services	
Contact ancillary services such as labs, MRI facilities, etc. that you refer patients to	Done
Suppliers/Service Contracts	
Inform medical suppliers, office suppliers, collection agencies, laundry services, housekeeping services, hazardous waste disposal services, magazine subscriptions, etc.	Not Yet Done
Request final statements from these vendors to close your accounts with them.	Not Yet Done
Other Physicians	
Let the colleagues that you work with, or refer to, know of your decision to close	Done
Utilities	
Notify all utility service providers of the day you wish to discontinue service	Not Yet Done
Tasks - 30 to 60 days before closing	75%
Patient Scheduling	
No new patients should be accepted once the closing date is announced	Not Yet Done
Start restricting nonemergent appointments as much as possible	Done
Patients who need continual follow-up and care should be referred to another provider	Not Yet Done
The directive for referral to other providers will be made during the staff meeting.	
Accounts Receivable	
Process your accounts receivable, as much as possible, to	Done

collect money owed to you

Consider employing a collection agency or staff member to reconcile accounts after the practice has closed

Done

Insurance Policies

Review your and your employees' insurance policies and update or cancel where appropriate: i.e., liability, health, life, disability, workers compensation, etc

Done

Obtain tail coverage extended liability insurance if necessary, which provides coverage against claims reported after the liability policy expires

Done

Medical Records

Arrange for safe storage for both paper and electronic medical records

Done

Notify your state medical board of the storage location

Not Yet Done

I will notify them after the staff meeting.

Determine the correct amount of time your medical records should be stored, as defined by your state law

Done

I am sure I know this but will clarify tomorrow.

Make sure the storage facility has experience handling confidential patient information and HIPAA agreements

Done

Establish a mailing address or PO Box for medical record requests after closing

Done

Clinic Documents & Equipment

Arrange for storage of personnel records according to your state law

Done

Organize the disposal or proper storage of clinic documents such as financial records, patient education materials, brochures, etc

Done

Plan to sell or lease office and medical equipment, if appropriate

Done

Medications

Follow the federal guidelines for disposing of prescription drugs and medications

Done

Contact drug representatives to determine what to do with

Done

unused samples, if applicable

Already contacted and we are aware of what to do.

Destroy all prescription pads

Done

Phone Service

Consider using an answering service or prepare messaging for office phone calls after the closing date

Not Yet Done

Mail Service

Contact the postal service to coordinate mail forwarding details

Not Yet Done

Completion

Comments/Recommendations

The staff meeting tomorrow is when we make the big announcement about the closing of our medical facility. There are a few remaining facility closing tasks and notifications to be done but those I will work on right after the staff meeting.

Name and Signature



Matt Andrews
16.06.2023 14:24 PST