**Closing a practice checklist**

This document contains a list of issues that a psychiatrist or their representative may need to consider or take action on when closing a practice. The list of proposed issues, which is broad and may or may not be relevant to all practices, is divided into the following sections:

* Patient health records
* Professional considerations & notifications
* Practice support notifications and actions
* Practice professional services notifications & actions
* Post-closure measures.

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| **Patient health records actions** | | **✓** |
| Complete | letters to patients |  |
| letters to general practitioners |  |
| patient summaries |  |
| handovers |  |
| Photocopy | lab results |  |
| key history letters |  |
| patient summaries |  |
| Finalise | discharge/referral database |  |
| Update | patients’ health records |  |
| Close | patient file with final check of health record completeness |  |
| Consider | health records storage options |  |

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| **Professional considerations & notifications** | | **✓** |
| Consider | AHPRA registration retirement options/track currency in AHPRA registration |  |
| RANZCP CPD/peer review requirements |  |
| RANZCP retirement options |  |
| AMA retirement options |  |
| Notify | peer review chair |  |
| MDO – check appropriate medical defence and insurance covers and clinical records retention requirements |  |
| RANZCP of change of address |  |
| Medicare re provider number(s) and Prescriber number – (cancellation/activation of home address) |  |
| hospitals where psychiatrist has admitting rights |  |
| jurisdictional health department |  |
| local community health centres |  |
| local pharmacies |  |
| local general practitioners/ other regular referrers |  |
| professional associations of change of address |  |
| journal subscriptions of change of addressor cancellation |  |
| other regular clinical/professional commitments |  |

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| **Practice support notifications & actions** | | **✓** |
| Notify | administrative staff |  |
| patients (options: telephone, letter, email, fax, SMS, website) |  |
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| Dispose | prescription pads/paper |  |
| Publish | optional – practice closure notice (e.g. AMA Branch newsletter) |  |
| mandatory – in ACT, NSW and Victoria – practice closure notice in local circular |  |
| Update | practice website |  |
| Notify | building manager |  |
| landlord |  |
| premises leasing body |  |
| cleaning company (book final cleaning service) |  |
| office supplier(s) |  |
| clinical equipment supplier(s) |  |
| photocopier service provider |  |
| IT equipment services |  |
| Cancel | marketing service(s) |  |
| business phone(s) |  |
| internet services provider(s) |  |
| Change | mobile phone number (if do not want to be contactable by patients) |  |

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| **Practice professional services notifications & actions** | | **✓** |
| Notify | accountant and seek business closure advice |  |
| financial adviser |  |
| taxation office |  |
| superannuation organisation(s) |  |
| WorkCover |  |
| lawyer |  |
| banking service(s) |  |
| payroll service |  |
| utilities (electricity, gas, water) |  |
| Obtain | final statements from suppliers and pay outstanding debts |  |
| Finalise | accounts records |  |
| Cancel | business name/registration |  |

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| **Post-closure measures** | | **✓** |
| Record | message on practice answering machine |  |
| Prepare | out-of-office email message |  |
| Place | notice of closure and contact details on practice door |  |
| Inform | professional answering service of new message |  |
| Arrange | mail forwarding address with postal service |  |
| Establish | dedicated telephone number |  |
| Set up | PO Box |  |