

Model Tool: Office move checklist

Why you need this checklist:

When moving offices, there is no room for error. Every day that physicians can't get into the new location or can't see their patients, the practice is out of business. The key to success is good planning.

How this checklist helps you:

This checklist contains essential items you must consider for a successful move.

How to use this checklist:

Customize this checklist for your own needs and keep it prominently displayed in your moving-related file folder or booklet.

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Planning

- Set moving date.
- Decide on layout of furniture and equipment in new office.
- Take measurements to ensure current furniture and equipment will fit. Allow adequate space around equipment for servicing and repair.
- Seek staff input on work area requirements, including placement of electrical outlets, telephone jacks, and network or cable connections in relation to furniture and medical equipment layout.
- Electrical and technology-related installations should meet current and future needs.
- Designate a liaison to coordinate electrical, telephone, network, and cable installation. Verify that wiring and placement of jacks, outlets, or other connections work with planned furniture and equipment layouts.
- Notify post office and arrange for forwarding of mail.
- Notify insurance company of new address and inquire if any riders are needed for move.
- Review your equipment leases and look for clauses relating to moving equipment and required notifications, and follow those requirements.
- Notify patients of new office location and the date of occupancy.
- Notify referring physicians of new address and effective date of occupancy.
- Notify payers of new address and effective date of occupancy.
- Notify your bank and arrange for printing of new checks.
- Update all forms, both in paper and on your EHR
- Update patient statements with correct remittance address.
- Notify your accountant of your new address and effective date.
- Notify any applicable tax agencies (e.g., city, county, and state) and any occupational, biohazard, CLIA, or equipment licenses.
- Arrange for new prescription pads, if applicable.

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- Arrange for new business cards to be printed, as well as letterhead and envelopes if you don't use computer-generated letterhead.
- Arrange for new signs on door and building.
- Notify your webmaster of your move early on to allow timely changes to be made to the website, including any hyperlinks to office location maps from mapping services.
- Be sure to update information posted online about your medical practice. Using Google, search by your practice name and your former address to locate any listings that need to be revised.

Preparing to move furniture and equipment

- Arrange for movers. Check references. Provide movers with keyed office furnishings plan, including staff plans of office areas, in advance of move.
- Follow-up with telephone company about installing new lines for phone, fax and Internet. Arrange for this to be done well in advance of move or you may be in your new office with no working phone, fax, or Internet connection. Provide telephone company with keyed office furnishings plan, including staff plans of office areas, in advance of installation.
- Arrange with computer consultant to set up equipment/network at new location. Postpone computer upgrades or other major changes until after the move.
- Arrange with medical equipment supplier or consultant to set up equipment at new location. Postpone upgrades or other major changes until after the move.
- Arrange with copier company to have the copier set up at the new location
- Based on planned layout of furniture and equipment in new office, re-measure spaces to ensure current furniture and equipment will fit. Remember to allow adequate space around equipment for servicing and repair.

The actual move

- Each person should pack her/his office the day before the move.
- Label each box and label each drawer with a corresponding number.
- Move on a weekend or give your staff the day off. It will be easier for the movers to work without the extra bodies.

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- Have the staff set up their offices after the furniture is set up and labeled boxes are delivered to the proper office room or area.
- Post a notice at your old office location directing visitors to the new address.

After the move

- Again, notify referring physicians. It is important to ensure they know of your new location. Make it easy for them to keep their patients informed and you will not drop any balls with receiving referrals.
- Consider publishing an advertisement about the new move. This will not only notify everyone about the move, but you can turn it into publicity by including pictures and language about the new office (e.g., extra exam rooms, easier access from Highway 96, a new X-ray machine, etc.)
- Consider placing a sticker about the new address on all payments to vendors. This will highlight the change and help to ensure they update their records so you will receive their invoices more timely.
- Ensure providers update their addresses for medical licenses, DEA license, etc.

This material is for informational purposes only and not for the purpose of providing legal advice. You should always contact your attorney to determine if this information, and your interpretation of it, is appropriate to your particular situation.

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