Checklist: What to do when a physician leaves your practice

MGMA members discussed how to manage a physician departure in our January Party Line department, and this checklist can help you get started. It is adapted from the MGMA Operating Policies and Procedures Manual by Elizabeth Woodcock, MBA, FACMPE, CPC, MGMA member, and Bette A. Warn, CMPE, MGMA member.

1. Providers have an obligation to respect a patient’s decision from whom to receive care. Therefore, it is the responsibility of all providers and other parties that may be involved to ensure that:
   a. Patients are notified of changes in the practice. This is often best done by letter to patients who are currently, or have recently been, under the provider’s care, and should explain the changes in the practice.
   b. Patients are provided with the form to release the records with instructions regarding faxing or mailing the form to the practice in order to release the records, and information about the location of the medical records storage and how they may access those records.
   c. Patients are advised how to reach any provider(s) remaining in the practice.
   d. Patients are informed that they may choose their healthcare providers.

2. Except in cases of death or other incapacity of a provider, providers may not abandon a patient or abruptly withdraw from caring for a patient. Therefore, patients must be given reasonable advance notice to allow them to secure other care or continue their care with the departing physician if desired. State guidelines may govern the continuity of care notification requirements.

3. The practice ensures that patient medical information is preserved, keeping it confidential and providing patients appropriate access to their medical records.

4. Patients are allowed considerable time to request that their records be copied and forwarded or transmitted to the new treating provider. (Please reference your state medical board’s guidelines regarding retention and destruction of medical records.)

5. Where appropriate, the departing provider makes referrals to new providers. The provider and other parties that may be involved ensure the requirements for continuity of care are effectively addressed.

6. Review your contracts.
   a. Read your building lease and ownership agreements for information about how to transfer or retain ownership.

7. In addition to notifying patients, other parties need to know of the change in your practice.
   a. Contact:
      1) The state medical board office to update the provider’s address of record
      2) The practice’s malpractice insurance carrier to advise it of the change in provider status
      3) Insurance companies with which the provider participates (including Medicare and Medicaid)
      4) Contracted hospitals
      5) The Drug Enforcement Administration
      6) Other contracted entities, including billing companies, accountants and information technology companies
      7) Provider membership organizations (such as the state medical association, specialty societies, etc.)

NOTE:
If the departing physician is a signator on any practice loans or equipment purchases, the bank or vendor may need to be notified. Some state laws require that the departing physician post a public notice about departure and where records will be available.