

Checklist for Departing Physician

Security Issues

- Change computer access codes
- Change all office security codes
- Secure all patient lists and patient information
- Secure all confidential practice information
- Make sure all keys are returned to the practice
- Consider having all access locks changed
- Cancel any remote computer access capability

Administrative Details

- Is physician eligible for COBRA coverage? If so, provide COBRA notice to physician; if not have physician removed from company health insurance policy
- Cancel or allow physician to pay to continue other practice purchased benefits (e.g. disability or life insurance)
- Retirement plan issues? Provide plan termination package
- Hospital staff fees, dues, etc. Do you want the departing physician to pay practice back for any unused portion? Can memberships be cancelled and refunds obtained?
- Does the practice owe the physician for any unreimbursed expenses (e.g. car allowance, CME expenses, vacation)?
- Is any incentive compensation owed?
- All patient records, histories, patient lists, etc. are the property of the practice, regardless of who saw the patient unless contractually agreed otherwise. The only way a copy of a patient's record is permitted to leave the office is by the patient authorizing its release and transferring it in writing
- Notify malpractice insurance carrier that physician has resigned and terminate physician's malpractice coverage. Have physician assign any refund for unearned professional liability insurance premiums to the practice
- Is physician responsible for purchasing the reporting endorsement (known as tail coverage) on claims made professional liability (malpractice) insurance?
- Draft and send Termination of Employment Letter or Termination Agreement outlining continuing obligations (if any) between practice and physician (e.g., non-compete, non-disparagement, non-solicitation, waiver of liability, etc.)? Have letter drafted and reviewed by practice attorney.
- If physician was an owner:

- remove from Board of Directors/Executive Committee
- remove from any offices held
- remove from Retirement Plan positions
- calculate deferred compensation payments
- calculate share redemption price/executive promissory note (if required)

Have the following items returned to the practice

- Practice keys
- Practice-owned medical instruments or other equipment
- Any practice credit cards. Cancel the card(s)
- Any practice telephone calling cards. Cancel the card(s)
- Beeper
- Cell phone
- Records, charts or billing cards in physician's possession
- Dictating equipment
- Hospital parking access card(s)
- Other?

Transition the new practice

- Make sure all patients scheduled to see the physician are reassigned to see another practice physician, if applicable
- Remind physician that pursuant to his/her Employment Agreement, he/she is expected to resign his/her clinical privileges at the Hospital, if applicable
- Rearrange the call schedule
- Make sure you have the physician's correct home (mailing) address. This is important for tax (Forms W-2 and K-1) and benefit purposes
- Make sure you get the physician's correct new business address and correct telephone numbers (home, business, cell and pager)
- Give physician's new business address and telephone numbers to whomever answers the practice phones
- If patients call and want to continue treatment with the physician, have office personnel give the patient the doctor's address
- Train all office personnel how to answer inquiries about the physician's departure in a positive manner. Have the office personnel only speak highly about the departing physician and the circumstances surrounding his/her departure

- Make sure that no one says anything negative about the circumstances surrounding the physician's departure to anyone. This only invites claims of libel, slander, etc.
- Make sure to have the physician removed from all provider/payor accounts
- Consider sending an announcement to referral physicians and to practice patients that the physician has previously seen advising them of the physician's departure
- Notify Hospital that physician is no longer with the practice and that physician should be removed from the call/coverage schedule

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