

Relocation Checklist

- ☐ Notify staff, landlords, and business partners
- ☐ Establish a relocation budget
- ☐ Assign a relocation coordinator
- ☐ Review current lease terms and notify landlord
- ☐ Set a tentative move date
- ☐ Begin searching for new office location
- ☐ Tour and evaluate potential new spaces
- ☐ Compare zoning, parking, access, and visibility
- ☐ Research city permits or approvals required for relocation
- ☐ Consult legal counsel for compliance planning
- ☐ Draft a relocation timeline and internal communication plan
- ☐ Notify malpractice insurer of pending move
- ☐ Begin searching for new office location
- ☐ Gather vendor quotes for movers, IT, telecom, and cleaning
- ☐ Update address with the state medical board
- ☐ Notify the DEA and update registration
- ☐ Notify CMS (Medicare/Medicaid)

- ☐ Update NPI registry
- ☐ Check local and state permit requirements
- ☐ Schedule inspections if required
- ☐ Inform malpractice insurer and obtain COI for new location
- ☐ Notify business license office of address change
- ☐ Update lab licenses (CLIA, if applicable)
- ☐ Notify OSHA if location impacts safety policies
- ☐ Update health department permits or certifications
- ☐ Confirm credentialing updates for all providers
- ☐ Draft patient notification letter/email
- ☐ Set up signage at old and new locations
- ☐ Post updates on website and patient portal
- ☐ Notify referring providers and pharmacies
- ☐ Create a plan for urgent care needs during downtime
- ☐ Ensure medical record access during move
- ☐ Take full inventory of all equipment and furniture
- ☐ Rent Plastic Moving Boxes from Stack
- ☐ Decide what to move, sell, donate, or replace
- ☐ Back up all medical and administrative data

- ☐ Check warranties and service agreements for equipment
- ☐ Pack fragile items with protective materials
- ☐ Create a detailed packing list by room/department
- ☐ Label boxes clearly by function and room destination
- ☐ Schedule internet installation at new office
- ☐ Notify your phone provider and transfer phone lines
- ☐ Ensure VOIP and fax systems will work on day one
- ☐ Plan data security and HIPAA compliance during transition
- ☐ Create a Wi-Fi/network plan for new office
- ☐ Assign IT staff or vendor to assist during move-in day
- ☐ Test IT systems before reopening
- ☐ Design a floor plan for the new location
- ☐ Assign rooms for reception, exams, staff, labs, etc.
- ☐ Ensure ADA compliance and accessibility
- ☐ Install signage for patient navigation
- ☐ Order new forms, brochures, or marketing material
- ☐ Install lockable cabinets and HIPAA-compliant storage
- ☐ Plan for employee break areas and storage
- ☐ Walk through the new space and test lighting, outlets, etc.

- ☐ Confirm moving date and vendor arrival times
- ☐ Pack non-essential equipment and supplies
- ☐ Secure and shred old documents as needed
- ☐ Transport controlled substances in compliance with DEA
- ☐ Forward mail through USPS and courier services
- ☐ Notify Stack to pick up boxes
- ☐ Have a printed move-day checklist for staff
- ☐ Prepare emergency contact list for move day
- ☐ Ensure moving trucks are on time
- ☐ Secure and protect sensitive records during transit
- ☐ Supervise equipment unloading and placement
- ☐ Test internet, phones, and key medical systems
- ☐ Set up reception area and confirm signage is visible
- ☐ Provide snacks/lunch for staff during the move
- ☐ Collect and inventory all keys, badges, and access cards
- ☐ Send reminder messages to patients with new address
- ☐ Confirm EHR, billing, and phone systems are operational
- ☐ Hold a staff debrief and gather feedback
- ☐ Celebrate the successful move