

# Medical Office 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**