THINGS TO CONSIDER WHEN A PHYSICIAN LEAVES OR RETIRES FROM YOUR PRACTICE

AMERICAN ACADEMY OF NEUROLOGY®

Practice

HR and IT

- Determine final date, factoring in PTO usage
- Remove from payroll system
- Remove from health insurance and other benefits
- Educate physician about timelines for last paycheck, including PTO and/or incentive payment
  - If departure violates terms of sign-on bonus, arrange for remediation
- Notify immigration office if physician is on a visa
- Schedule an exit interview if part of your practice's policy
- Technology
  - Terminate email, being mindful to separate personal emails
  - Terminate cell phone coverage
  - Terminate computer and systems access
  - Determine timeline for turning over institution hardware including laptop/computer, ID badge, keys, pager, and access card(s)

Communications

- Draft organization communication (partners, colleagues, staff) incorporating the practice's standard recognition policies
- Review state regulations (e.g., requirements of notifying patients), then draft patient communication including:
  - Staff script for when talking to patients
  - Letters
  - Website alerts
  - Brochures
  - Signage
  - Letterhead
- Notify community and referring physicians

Operations

- Decommission white coat
- Consider changes to patient cohorts such as discontinuing seeing new patients, reassigning existing patients, etc.
- Determine who is going to take over inbox (consider if going to a location that is on same EHR system, physician may get some cross over)
  - Note: pharmacies may find physician at a new location to manage refills of previous patients
- Develop succession plan for on-call coverage
- Notify practice's answering service

Finance, Compliance, and Other

- Manage accounts receivable (AR) as outlined in the physician's contract
- De-credential, i.e., unlink from tax ID, after AR is collected
- Terminate company credit card access
- Terminate privileges
- Consider if physician is the name of record for various things (e.g., reporting meaningful use)
- Notify national entities:
  - National Plan and Provider Enumeration System (NPPES) log in, linked with Sunshine Act
  - Medicare Provider Enrollment, Chair, and Ownership System (PECOS), which is Medicare credentialing
- If retiring, reassign Medicare enrollment
- If retiring, review terms of the physician's 401k draw, buyout options
- If closing the practice, follow state and federal record management and retention requirements
- Other items that may be impacted by physician departure:
  - Clinical trials, including those where the physician is listed as principal or sub-investigator
  - Grants and funding
  - Medical equipment ownership
  - Licensing "per provider" (e.g., EHR, membership dues, etc.)
  - Leases/liens/lines of credit/trustees
  - Institution committees (academic practices)
- Reassign mentorships for residents, junior faculty (academic practices)
- Consider if physician is a named fiduciary on the practice's retirement plan

Provider

- Determine if there are supplement benefits that you can purchase (e.g., health insurance, disability insurance, malpractice)
- Follow your organization's protocols regarding closing and signing notes/hospital charts, remembering to complete discharge summaries, outstanding orders, and death certificates
- For academic practices, follow your organization's completion of fellow/resident/student evaluations
- Review malpractice terms and policies, including:
  - Claims made vs. occurrence policy
  - Tail coverage
- Obtain copies of CME
- Understand who manages change of address
- If allowed, make copies of your smart phrases and EHR customization
- Update DEA and state licenses