

Closing or Leaving a Medical Practice

Checklist

PLEASE NOTE: This checklist is meant to supplement the [Closing or Leaving a Medical Practice](#) standard and [Advice to the Profession](#) document. Additionally, not all items will apply to all physicians/practice situations.

First steps:

- Read CPSA's [Closing or Leaving a Medical Practice Standard of Practice](#). It is important to review this standard in detail as there are many clauses that apply to retirement.
- Read CPSA's [Advice to the Profession](#) for further details that may be helpful.

Transfer of patient care:

- Attempt to place patients under acute and/or active care with another healthcare provider.
- Notify patients seen within the past year who have an expectation of ongoing care 90 days in advance of closing or leaving your practice.
- Stop accepting referrals/new patients if the clinical matter cannot be resolved prior to closing or leaving your practice.
- Arrange follow-up for any outstanding investigations, test results or reports with another healthcare provider.
- Notify all healthcare providers to whom you regularly refer or from whom you regularly receive referrals, hospitals where you hold privileges, employers and the Alberta Health Care Insurance Plan, if applicable, 90 days in advance of closing or leaving your practice.

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Disposition of patient records and medical devices:

- Ensure an Information Sharing Agreement (ISA) is in place if custodianship of patient records is not maintained (if you are considered an affiliate, an ISA is not required).
- If considered the custodian of your patient records, ensure secure storage and disposition of patient records (if you are considered an affiliate, you are not required to make storage arrangements for patient records).
- If not maintaining custodianship of your patient records (i.e., a colleague designated a custodian under the [Health Information Regulation](#) takes over custodianship of your records), submit a [Custody of Patient Records Form](#).
- Dispose of medications, equipment and supplies in a safe manner.

Provide CPSA with the following:

- Submit the [Notification of Change Form through your CPSA Portal](#) at least 90 days prior to closing or leaving your medical practice. This form will collect all the information we need from you in advance of your retirement. The form can be found on the portal's main landing page, embedded as a link in the header text.
- Submit a [Professional Corporation Information Form](#) if applicable.
- Return any unused [TPP Alberta](#) pads and submit the [Pad Return Form](#).

Please void the pads with a strikethrough or other method and return them to us by regular or registered mail if you prefer to have tracking information so you know when we've received them. After we've received the pads, we will void them in our system and shred them.

Unused pads can be sent to:
CPSA
Attn: TPP Alberta
2700 – 10020 100 Street NW
Edmonton, AB Canada T5J 0N3

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FORMS

- [Custody of Patient Records Form](#)
- [Notification of Change Form through your CPSA Portal](#)
- [Professional Corporation Information Form](#)
- [TPP Alberta Pad Return Form](#)

QUESTIONS? Contact support@cpsa.ca.