Therapy office lease due diligence

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use while comparing written lease or sublease terms and before signing or renewing.	This is not legal advice, a lease review, or a finding that the room complies with accessibility, privacy, zoning, or building rules.

Working record

Prepared by	
Reference (no names)	
Date opened	
Next review date	

Six review points

1	**[ ] Calculate the full occupancy cost** Record base rent, deposits, utilities, shared charges, increases, insurance, furnishings, and restoration obligations. **Your record:** _____ **Source:** IRS: recordkeeping for individuals
2	**[ ] Confirm permitted use in writing** Identify the exact therapy use, hours, visitors, signage, telehealth, group work, and subletting allowed. **Your record:** _____ **Source:** ADA.gov: guidance for businesses
3	**[ ] Test sound and arrival privacy** Observe adjacent rooms, corridors, waiting, check-in, conversations, doors, and shared calendars during realistic use. **Your record:** _____ **Source:** HHS: Privacy Rule guidance
4	**[ ] Walk accessibility facts** Record the client route and building-controlled barriers; obtain professional review where needed. **Your record:** _____ **Source:** ADA.gov: guidance for businesses

5	**[ ] Map operations and outages** Clarify keys, internet, cleaning, mail, safety, repairs, emergency access, and building closures. **Your record:** _____ **Source:** HHS: Security Rule guidance

6	**[ ] Read exit and transfer terms** Record notice, renewal, assignment, sublease, default, damage, and data or property removal provisions. **Your record:** _____ **Source:** IRS: recordkeeping for individuals

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- IRS: recordkeeping for individuals
- ADA.gov: guidance for businesses
- HHS: Privacy Rule guidance
- HHS: Security Rule guidance

Educational information only. Not legal, clinical, tax, billing, or regulatory advice. Recheck every source before relying on an older saved copy. Do not put client-identifying information in a copy you cannot secure.