

Practice closure and records handoff

A practical California working record - editable in Word

USE IT THIS WAY Use for planned closure, extended incapacity, retirement, relocation, or activation of a professional will.	DO NOT MISTAKE IT FOR THIS This is not a professional will, client termination plan, or legal determination of records custody.
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Working record

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

Six review points

1**[] Define the closure facts**

Record effective dates, services affected, responsible people, and whether the interruption is temporary or permanent.

Your record: _____

Source: [BBS: statutes, regulations, and law changes](#)

2**[] Plan client continuity**

Document notice routes, emergency information, transition choices, and clinical review responsibilities.

Your record: _____

Source: [BBS: statutes, regulations, and law changes](#)

3**[] Assign records custody**

Record who will maintain access, respond to requests, protect records, and act after the practice closes.

Your record: _____

Source: [California Health and Safety Code section 123145](#)

4**[] Close vendor pathways**

Inventory EHR, phone, email, billing, payment, storage, and website obligations before accounts disappear.

Your record: _____

Source: [HHS: business associates](#)

5

[] Update public information

Correct websites, directories, voicemail, office signage, and license-related information.

Your record: _____

Source: [BBS: HIPAA, telehealth, advertising, and notices](#)

6

[] Preserve the closure file

Keep decisions, notices, delivery evidence, contracts, and advice relied upon in one secured record.

Your record: _____

Source: [California Health and Safety Code section 123145](#)

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- [BBS: statutes, regulations, and law changes](#)
- [California Health and Safety Code section 123145](#)
- [HHS: business associates](#)
- [BBS: HIPAA, telehealth, advertising, and notices](#)

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.