

Our RELOCATION CHECKLIST will help you with details and keep you on task.

Relocation Checklist:

1. Moving Plan

- Determine your budget
- Diagram of your new office showing where all furniture and equipment should go
- Date for moving - Make sure to allow yourself enough time to prepare before the movers arrive
- Inventory the contents of the office and declutter
- Inventory supplies
- Sort and Secure any Patient Data
 - This is a great opportunity to check the security of your patient records. Make sure you have your patient files electronically backed up on the cloud or at an offsite.
 - If you still have paper files, you will need to be sure they are securely packed and transported. Consider keeping the files of patients you expect to see in the first few week separate so you have easy access as soon as you move in

2. Delegation

- Delegate specific responsibilities to your team members and have a system to insure everything is getting done.

3. Update all licensing information

- Do you need a new tax ID/NPI?
- Update license information with your state, local & national boards that apply - most states require notification within 10 days of a change of address.
- Update info for DEA

Registration changes (change of address) should not be submitted until an approved state license for the new address is received. Changes will become effective immediately upon DEA approval.

DEA Call Center: (800) 882-9539

E-mail: DEA.Registration.Help@usdoj.gov

Web: www.deadiversion.usdoj.gov

4. Moving Company

- Choose a moving company
- Settle on a moving date and get a price estimate.

5. Professional Notifications

- Landlord/Lease Holder
- Accountant
- Financial Institutions - Banks, Lenders, etc.

- United States Postal Service
 - Internal Revenue Service
 - Utility companies/municipal services
 - Practice software companies
 - Website design company
 - Product suppliers
 - Answering service if applicable
 - Patient payment/finance companies
 - Insurance Providers
 - Electronic Claims clearinghouse
 - Credit card companies
 - Credit card processing companies
 - Professional Associations - ADA, AGD, Local Dental Societies, etc.
- 6. Notify Patients**
- Notify your patients of your relocation. Contact them by phone, mail and email at least two months before you move. It's also a good idea to post a reminder in your waiting room and on your office voicemail.
 - Display flyers in the office, discuss during confirmation calls, check-in & check-out
 - Targeted emails
 - Social media posts
 - Have new appointment cards printed with new location to give out for the next appointment
 - Send postcards/letter announcing the move to all patients
 - Include message about relocation in on-hold and/or after hours message
- 7. Marketing**
- Update letterhead, business cards and patient hand-outs reflecting the change in your location.
 - Create a marketing plan to draw new patients to your new location - NP special, etc.
 - Plan an open house at your new location.
- 8. Additional information for consideration**
- Place an ad in local newspaper
 - Sent thank you notes to local businesses/referrals that supported your former office & provide them with new business cards and/or care to share cards
 - THANK YOUR PATIENTS FOR STAYING WITH YOU AND COMING TO YOUR NEW LOCATION