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Steps To Take When a Provider Leaves Your Practice

When a provider leaves your practice, even on the best of terms, it is important to secure your patient information and inform your vendors of the change. Here are a few suggestions to help guide you through the process.

Before the Provider Leaves

If possible, complete these steps before the provider leaves the practice.

Complete Provider Responsibilities

- Complete all visit charting and billing
- Fill all prescriptions and renewals
- Complete all signing tasks
- Complete and close all messaging tasks
- Review and close all practice-related email threads
- Review and close all direct secure messages
- Prepare desk to be cleared out and laptop to be wiped

Reschedule and Inform Patients

- Reschedule any patients scheduled after the provider's last day.
- Remove the provider's hours in the Appointment Book.
- Consider sending a batch message to inform patients.
- Consider running reports of scheduled patients who have the provider as their Primary Care Provider (PCP) and assign them a new PCP.

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Anticipate Workflow Changes

- Designate a new provider to address any outstanding items that the provider does not complete before leaving.
- Review office workflows that include the individual and make a plan for when the provider leaves.

Inform Your Vendors and Collaborators

- Call your vendors, including PCC, and tell them the provider is leaving. Your vendors may have their own checklist for security measures to take when a provider leaves.

After the Provider Leaves

Once the provider leaves your practice, restrict their access to patient information and the physical office.

Restrict Access to PCC EHR

- Follow all steps described in the [Steps to Take When a Clinician Leaves Your Practice](#) article on Learn.pcc.com.
- Call PCC Support for assistance at any time.

Restrict Vendor and Account Access

- Inform your insurance companies that the provider is no longer with your practice.
- Inform other health network accounts that the provider is no longer with your practice.

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- Inform specialists and health care entities that the provider is no longer with your practice.
- If applicable, change the password and permissions for banks and financial institutions with whom your practice does business.
- If applicable, change passwords and permissions for your practice website management, social media, and other online services.
- Change the passwords for your practice's online retailers.
- If your practice uses Direct Secure Messaging, and if the provider was the primary DSM representative for the practice, contact PCC to complete ID proofing for a different provider.
- Shut down the provider's practice email account and block or redirect all incoming mail to a current employee.
 - If the account was set up by the provider, make a new account and close or delete the old account.
 - PCC does not recommend forwarding emails from the provider's work email to their new work or home email.
 - PCC does not recommend reusing accounts. Always make a new account for new employees.

Limit Access to the Physical Office

- Change passwords to shared phone system accounts.
- Change passwords to shared computer workstations and WiFi.
- Change the locks for the physical office and security system.
- Wipe and refresh the provider's office laptop or workstation.
- Inform all employees, including remote or part-time employees, that the provider no longer works for the practice.

- Inform employees and vendors that share access to the physical office, such as your cleaning service, IT techs, billing service, landscapers, and groups that may rent or share the office with you.
- Inform your property manager that the provider no longer works at your practice.