Laboratory Relocation Planning Checklists

The primary purpose of this document is to assist laboratories that are preparing to move to a new facility. A strategic plan should be created to ensure minimal workload disruption. The laboratory should have a documented plan and timeline for the move, including departments, staff, assays and equipment; include documentation of notification and commitments by all outside services such as equipment service representatives, IT department and LIS vendor, moving service, etc. Laboratory personnel must ensure that integrity of samples, reagents and testing equipment is maintained during and following a physical relocation of a laboratory. Proper storage and transport of records must be considered. It is also essential that the safety of laboratory personnel be ensured during all phases of the relocation. A relocation checklist with references to relevant section of the Audit Shell is also provided.

Laboratory Information

Director(s):

Institution:

Primary Network Laboratory:

Active Protocols:

Moving from Address:

Moving to Address:

Date of Move:

Next Audit/Inspection Scheduled:

Laboratory Relocation Checklist

	✓	Notes/comments
Pre-Move Organization and Planning		
Notify DAIDS at the beginning of the planning stage of intention to relocate for assessment of impact on protocols		
Evaluate workload and determine best day/time for move to occur. Ensure adequate staffing for move and days following when there may be a back-log of specimens to test		
Inventory all equipment and supplies by room		
Determine schedule and timeline for move of equipment		
Outline plan for ensuring that reagents and specimens will be kept at appropriate temperatures		
Assign personnel to be in charge of specific areas/aspects of the move		
Organize and pre-plan packing and labeling of records, especially patient records, QA files and other source documentation		
Determine if additional resources will be needed for the move (personnel, supplies, equipment, etc.)		
Ensure appropriate training; staff from the laboratory and clinics, etc. will need to receive training with the new space, such as specimen drop off procedures and temperature monitoring		
Publish maps and telephone numbers of the new location as appropriate		
Publish directions to new location and provide appropriate contact information to staff and clients		
Ensure that all IT data systems are backed up to portable media, or media off-site		
Create a written plan for the move		
Notify Organizations Below (as applicable)		
Submit written plan to any trial sponsors, such as DAIDS/Networks in advance for approval		

Moving service; ensure that all personnel involved in move have been trained in Standard Precautions		
Notify any accrediting agencies as applicable (e.g. CAP, SANAS)		
Bio-safety department		
Fire safety department		
Radiation safety department		
Chemical safety department		
Housekeeping		
Waste disposal service		
Backup or reference laboratories		
Instrument service contract/maintenance providers		
If moving LIS/LDMS systems, contact company for requirements for move		
Notify communications supplier (phone/fax service, internet service provider, etc.)		
Clients (clinics, physicians, study participants as applicable); notify them of anticipated downtime and back up arrangements		
Pre-Move Instrument Validation Planning		
Request service/technical representatives for appropriate equipment to be available to assist, and ensure sensitive equipment is moved properly		
Determine and plan for necessary validation steps for all instruments. Instruments will need to be set up and calibrated according to manufacturer's recommendations. Post move validation must include precision, accuracy and at least high, low and mid linearity verification		
Ensure a basic or backup laboratory is setup and staffed to perform the most time-sensitive tasks during the move. Workflow disruptions should be minimized or eliminated. Begin operations in the new space, if possible, before ending operations in the old.		
With duplicate pieces of equipment, consider establishing two working areas: one in the new and one in the old during the move process		

Pre-order extra reagents, QC, calibrators or EQA materials as needed		
Run and store any samples needed for accuracy verification prior to instrument move		
Determine how many phone lines and data ports are necessary		
Perform pre-move validation on LIS/LDMS system as needed		
Acceptance of New Building Prior to Move-in		
Verify location readiness by testing the following systems (as applicable)		
Temperature and humidity controls (Heating and A/C)		
Electrical (including back-up generators and UPS outlets)		
Vacuums		
Safety Equipment (e.g. eye washes, safety showers, smoke detectors, emergency lights, etc.)		
Sewer		
Phone, Data, Internet connections		
Water Quality		
IT/LIS systems		
Pre-plan location of all equipment in new location		
Plan for cleaning and/or disinfection of space as needed prior to move		
Verify adequate space for workflow before beginning move-in of equipment		
Pre-plan location of all IT/communication equipment in new location		
Verify adequate space and requirement for LIS/LDMS equipment in new location.		
Inventory all equipment to determine whether it still meets the needs of the laboratory in new location		

List any equipment that needs upgrading or replacing and order any necessary equipment		
Check wiring for IT system and power outlets, upgrade as needed		
Work with IT department/company to install new outlets as needed		
Check wiring of phone/fax lines		
Work with phone service provider to repair or upgrade phone/fax lines as needed		
Verify evacuation route and emergency exits are adequate		
Train personnel on safety procedures in new location		
Decommissioning/Decontamination of Old Location		
Follow manufacturer's recommendations for decommissioning of equipment		
Arrange for pick up of any equipment that will not be moved to new location		
Decontaminate Equipment. Contact your institution's safety department for guidance on decontamination procedures.		
Remove the potential threat of sharps such as sample probes		
Wrap or seal equipment as designated by vendors and/or safety department		
Move-in Day		
Ensure all telephone and fax lines are working properly.		
Distribute new phone numbers to all personnel.		
Confirm IT equipment/phone lines working properly.		
Were new phone/fax numbers necessary? Notify all stakeholders.		
Inventory all moved material to ensure nothing is missing.		
Post Move Follow Up		

During the move, document problems, challenges, successes and failures, along with any corrective actions		
After completion of the move, create a written Post-Move report to document the above. This can assist in future moves of your location and be a learning tool for other labs preparing for a move.		
Communicate with accreditation agencies, DAIDS and networks that move has been completed		

Laboratory Relocation Audit Reference Checklist

Audit Reference and Guidelines for Laboratory Staff	✓	Notes/comments
I. External Quality Assurance		
I.1. Does the laboratory participate in any external proficiency programs for DAIDS-supported protocol-related assays? – Ensure that there is no interruption or delay in proficiency testing due to relocation activities. – Request extensions from pSMILE as needed if testing will be impacted by the lab move.		
II. Organization and Personnel		
II.D. Has the laboratory been certified by any regulatory/accrediting agency? – Notify your regulatory agency (e.g. CAP, SANAS) and DAIDS of your intention to move. Submit relocation plan to DAIDS and pSMILE at least one month prior to the move. – Are there any additional requirements or inspections needed from your accrediting agency?		
V. LIS		
V.B. Is an LIS utilized in this laboratory? – Contact service representative for assistance in moving/installing the LIS in the new location. – Validate functionality of LIS after installation.		
VI. LDMS		

VI.A. Does the laboratory contain an LDMS? – Contact equipment representative for assistance in moving/installing the LDMS in the new location. – Validate functionality of LDMS after installation following guidelines from manufacturer.		
VIII. Physical Facilities		
VIII.2. Ventilation and Humidity – Verify that humidity and ventilation are adequately controlled in new space		
VIII.3. Ambient Temperature – Monitor ambient temperature and document within tolerance limits for minimum of 24 hours before moving in equipment and reagents		
VIII.6. Adequate space – Ensure that the new location has adequate space for quality work and personnel safety.		
IX. Equipment		
IX.E.1-3. Freezers, Refrigerators, and Liquid Nitrogen Freezers – Locate alternate freezer and refrigerator storage for samples/reagents during relocation. – Verify that freezers and refrigerators maintain temperatures within stated limits post move (suggest 24 hours of monitoring). – Do not return samples until temperature is verified		

IX.E.5. Incubators – Verify that temperatures and/or CO2 reading are within tolerance limits post-move.		
IX.E.6. Water Baths – Verify that water bath temperature is within stated tolerance limits post-move.		
IX.E.7. Centrifuges – Follow centrifuge calibration procedure to verify that speed and timer on centrifuge are within tolerance limits post move		
IX.E.8. Biosafety Cabinets – Contact local agency to re-certify biosafety hood post move		
IX.E.10-14. Chemistry, Hematology, Immunology, Flow Cytometry, PCR/Molecular Instrumentation – Follow manufacturer's recommendations for proper shut down procedure before moving. – Contact instrument service representative to perform any required service following a move. – Perform validation to include: ○ Precision ○ Accuracy ○ Linearity Verification ○ If applicable, validate performance of washers, plate readers, pipetting equipment following manufacturer's recommendations – If applicable, ensure that new space is adequate/appropriate for amplification requirements		

IX.E.17. Scales and Balances – Contact instrument service representative to perform any required service following a move. – Allow balance time to equilibrate and adjust to new location following manufacturer's recommendations – Perform balance calibration/verification to ensure proper operation		
IX.E.20. Additional Equipment – Verify performance of any additional equipment, contacting manufacturer for service as appropriate. Additional equipment may include: slide stainers, microscopes, rockers, rotators, etc.		
IX.F.1. Temperature Monitoring – Verify functionality of temperature monitoring 7 days per week at new location		
IX.G. Backup power resources – Document functionality of backup generator and all UPS power sources in new location		
X. Test and Control Articles		
X.E. Reagents/Testing Kits/Solutions – Ensure that reagents have been placed in appropriate alternate storage during the move. Once the reagents have been moved to new location, re-QC any reagents that may have been compromised due to improper storage during the move		

X.F. Water Quality – Verify that water quality meets stated standards in new location		
XI. Records and Reports		
XI.B-C. Specimen Tracking/Chain of Custody – Ensure that specimen tracking and chain of custody can be maintained in new location. – Update specimen management SOPs to reflect changes caused by the move.		
XI.E. Laboratory Reports – Update lab reports and letterhead to reflect new location		
XIII. Personnel Safety		
XIII.B.1-2. MSDS – Ensure that all required MSDS sheets are moved to new lab and located in a place that is accessible to lab personnel		
XIII.D.2. Chemical Hygiene/Hazardous Materials Plans – Ensure that Chemical Hygiene/HazMat Plans can be followed in new space. – Update applicable SOPs to reflect changes in location		

XIII.E. Safety Equipment – Verify operation and location of all safety equipment to include: ○ Fire extinguishers ○ Eye washes ○ Safety showers ○ Sharps containers		

References

1. American Society for Histocompatibility and Immunology. (2018). ASHI Accreditation Program Inspector's Checklist, Laboratory Relocation Inspection.
2. College of American Pathologists (CAP) 2023. Commission on Laboratory Accreditation, Laboratory Accreditation Program; Laboratory General Checklist, Revised 8/24/2023.
3. CLSI. *General Laboratory Equipment Performance Qualification, Use, and Maintenance*. 2nd ed. CLSI guideline QMS23. Wayne, PA: Clinical Laboratory Standards Institute; 2019.