**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:

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| **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 |  |  |

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| **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.