

# New Practice Start-Up Checklist

There is a lot to think about when you choose to start your own medical practice. Use this checklist, developed by practice management expert Audrey McLaughlin, to help you make sure you've covered your bases.

# **Office Selection & Setup**

- Site Selection
- Sign lease (review with real-estate attorney)
- Building Finish Out
- □ Certifcate of Occupancy
  - Fire Inspection
  - Safety Inspection
  - City Inspections
- □ Furnishings/Supplies
- □ Set Office Hours
- Signage

# **Office Selection & Setup**

- Acquire Tax ID , NPI, DEA, & State Controlled
  Substance (if applicable) Numbers
- Bank Accounts
- □ Credentialing
- Sales Tax Certificate
  (depending on state requirements)
- Office Overhead
- □ Accounting Firm/Software Selection
- □ Survey of Insurance Fees
- Develop Fee schedule
- □ Order CPT, HCPCS, & ICD Code Books
- □ Establish Patient Financial Policy

## **Administrative Setup**

- Determine Legal Structure
  (discuss with attorney or accountant)
- Business License
- □ Insurance:
  - Office Liability
  - Business Interruption
  - Employee Fidelity Bond
  - Of ce Contents
  - Umbrella Policy
  - Workers Compensation
  - Health/Disability/Life
  - Malpractice (rates vary by location)
- □ Policies/Procedures/Protocols Manual
- Join Chamber, IPA, Local Business
  Organizations
- □ Hospital Priviledges

### **Business Planning**

- □ Marketing Plan
- □ Financial Plan/Budget
- □ Strategic Plan/Goal Setting

# Implementations/Inspections/Training

- OSHA
- Stark
- CLIA
- HIPAA
- □ Universal Protocol Training
- Obtain & Post Required Posters
  (i.e., OSHA, Equal Pay, etc.)

## **Equipment & Technology**

- □ Practice Management & Billing Software
- □ Electronic Health Records
- Phone System
- □ Hardware
- □ Internet

# Notes

### Vendors

- Document Destruction
- Medical Waste
- □ Laboratory
- Credit Cards
- Janitorial Needs
- □ Office Supplies
- Maintenance

## Staffing

- Job Descriptions
- □ Hire/Train Staff
- Employee Handbook
  (policies/requirements)
- □ Insurance Coverage
- Payroll Service

