



New Practice Start-Up Checklist



There is a lot to think about when you choose to start your own healthcare practice. Use this checklist, to make sure that you have covered all of your bases.

Office Selection & Setup

- Site Selection
- Sign lease (review with real-estate attorney)
- Building Finish Out
- Certificate 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
 - Office Contents
 - Umbrella Policy
 - Workers Compensation
 - Health/Disability/Life
 - Malpractice (rates vary by location)
- Policies/Procedures/Protocols Manual
- Join Chamber, IPA, Local Business
- Organizations
- Hospital Privileges

Business Planning

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

