



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

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
- ☐ Patient Engagement Software
- ☐ Phone System
- ☐ Hardware
- ☐ Internet
- ☐ Voice Activation Software

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