

Opening a Medical Practice Checklist

Congratulations on taking the step to opening a medical practice! Below is a checklist of information we hope you will find useful in starting your new practice.

Administrative

- Have you determined your business entity structure? Consider the following:
 - Number of owners
 - Tax and legal considerations
 - Recommend speaking with a tax attorney and/or an accountant
- If you have one or more employees, have you contacted the Internal Revenue Service for an identification number, forms, and instructions? You will need to use form SS4 to apply for a Federal ID number.
- Do you have a business plan in place? Consider the following:
 - Revenue assumptions (i.e. patients per day, revenue per encounter, etc.) vs. Expense Assumptions (i.e. Staff salaries, payroll taxes, bank charges, malpractice insurance, lab fees, licenses, medical supplies, utilities, etc.)
 - Vision for the office in 1 year, 5 years, 10 years
- Do you have all your office help? Consider the following:
 - Consultants: Attorney, Certified Public Accountant, etc.
 - In-office staff: Medical Assistants, Registered Nurses, Nurse Practitioners, Physician Assistants, Schedulers, Receptionists, Check-in/out Staff, Phone staff, Human Resources Representative, Office Manager, Administrator, Billing/Coding Specialists, Lab Tech, Marketing Coordinator, Phlebotomist, Ultrasound Tech, Triage Staff, Administrative Assistant, Surgery Schedulers, Supervisors, etc.
 - Daily schedules for staff (start and end times, lunch shifts, etc.)
 - How will this look operationally/what is the staff hierarchy?
- Do you have Human Resources needs in place? Consider the following:
 - New hire/Orientation
 - Performance reviews
 - Personnel files
 - Sanctions Policy
 - Regular staff meetings
 - Compliance with labor laws
 - i.e. ADA, Federal Equal Employment Opportunity (EEO) Laws, Age Discrimination Act of 1967, Fair Labor Standards Act, Equal Pay Act, FMLA, etc.
 - Job descriptions
 - Employee Handbook
 - Employee Benefits, i.e. Medical, Dental, Vision, PTO, 401K, etc.
 - Payroll
- Have you established a fee schedule or charge master?
- Have you established internal operational procedures?
- Have you purchased all the appropriate equipment for office needs?

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- i.e. autoclave, patient tables, patient gowns, personal protective equipment, phones and paging systems, workstations, secured filing cabinets, desks, desk chairs, waiting room furniture, etc.
 - Consider leasing vs. purchasing
- Do you have a banking institution and the appropriate accounts set up?
- Do you have a marketing plan in place?
 - Have you notified local media for publicity?
- Do you need a zoning permit for your office?
- Is there adequate parking, storage, and administrative space at the office?
- Have you established a list and relationship with referral sources?
- Have you arranged for printing of office material, such as appointment reminder cards?
- Have you arranged for printing your announcements of opening your practice?
 - Do you need assistance in mailing your announcements?
 - Contact the El Paso County Medical Society, powered by ProPractice for information about mailing services, (719) 591-2424 or epcms@epcms.org

Credentialing/Insurance Paneling

- Do you have your license to practice in Colorado?
- Do you have your narcotics registration license?
- Have you applied for a National Provider Identifier (NPI) number?
- Have you completed the credentialing process for privileges at local medical facilities (allow for at least 6-8 weeks)?
 - Contact the El Paso County Medical Society, powered by ProPractice for information about our Credentialing services, (719) 591-2424 or ccvs@epcms.org
- Have you completed Insurance Paneling? Consider the following:
 - Analyze your payer mix for a balance of commercial and government payers
 - Review of most commonly billed CPT codes
 - Contact the El Paso County Medical Society, powered by ProPractice for information about our Insurance Paneling services (719) 591-2424 or ccvs@epcms.org
- Have you contacted Medicare for an identification number?
- Have you contacted Medicaid for an identification number?

Compliance

- Have you arranged for the office to be OSHA compliant?
 - Written manual with Policies & Procedures
 - All staff training
 - Some items to consider:

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- Using EPA Registered disinfectants and sterilants for surfaces, equipment, and instruments
 - Needles with safety devices
 - What chemicals are used in the office, and are employees aware of the hazards?
- Contact the El Paso County Medical Society, powered by ProPractice for information about our OSHA compliance services, (719) 591-2424 or epcms@epcms.org
- Have you arranged for the office to be HIPAA compliant?
 - Security Risk Analysis
 - Written manual with Policies & Procedures
 - All staff training
 - Confidentiality Agreements
 - Consider: Physical, Administrative, and Technical Safeguards
 - Contact the El Paso County Medical Society, powered by ProPractice for information about our HIPAA compliance services, (719) 591-2424 or epcms@epcms.org
- Do you have an Emergency Preparedness Plan in place?
 - Contact the El Paso County Medical Society, powered by ProPractice for information about our Emergency Preparedness services, (719) 591-2424 or epcms@epcms.org
- Is your new office ADA certified?
- Are you aware of your public health obligations – diseases reportable by law, etc?

Vendors/Business Partners

- Have you established a relationship with a laboratory & imaging facility?
- Have you arranged professional liability and other insurance, i.e. Worker's Compensation?
- Have you picked out an EMR software and a billing software that are able to be integrated together?
 - Consider capabilities and technical support
- Have you arranged for a billing service, or will this be done internally?
- Have you arranged for a collection agency?
- Have you arranged for a payroll company?
- Have you contacted a shredding company?
 - How often will they pick up the secured documents?
- Have you hired either an internal or external IT Service?
- Have you hired a janitorial service?
- Have you arranged for a telephone answering service? Consider the following:
 - What hours will the service be utilized? Will the office be open during lunch?

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Do you have any other questions?

The El Paso County Medical Society, powered by ProPractice will gladly help you find the answers, contact us at (719) 591-2424 or epcms@epcms.org.