

Startup Checklist

This practical checklist offers a broad overview of the step-by-step process for starting a medical practice. Be sure to review all applicable state laws and requirements before moving forward with the process.

Site/Business Registration

- Complete any state-based business and commerce requirements
- Apply for permits (such as a certificate of need)
- Obtain an employer identification number (EIN) from the IRS
- Identify a business site that complies with mortgage rules and practice needs
- Secure the appropriate licenses (DEA, NPI, for example)

If applicable:

- Obtain required CLIA (Clinical Laboratory Improvement Amendments) certificates
- Fulfill radiation registration through DSHS

Credentialing and Enrollment

- Create CAQH profiles for all providers
- Enroll with federal coverage entities (Medicare and Medicaid)
- Apply for commercial insurer enrollment
- Negotiate payor contracts

Regulatory Compliance

- Establish policies and protocols that comply with regulatory authorities (like OSHA) or privacy laws (like HIPAA)
- Ensure training on necessary regulatory measures (mandatory reporting, for example)
- Create a living Emergency Operations Plan (EOP)
- Post or display compliance information as mandated by law

Human Resources

- Staff the clinic with in-house employees (such as clinicians, administrative staff, housekeeping, reception assistants)

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- Maintain employee records (including background checks and tax documentation)
- Develop practice policies, procedures, and employee handbook(s)

Finance and Operations

- Select financial/administrative software
- Set up billing and payroll processes
- Establish banking and accounting relationships
- Partner with a legal service
- Select insurance providers (for malpractice coverage, for example)

Vendor considerations:

- Electronic healthcare record (EHR) software or platform
- Housekeeping (if not in-house)
- Office supply
- Waste management
- Medical waste disposal (including sharps and biohazards)
- Document destruction
- Laboratory services
- Medical gas
- Linen services

Marketing and Advertising

- Website with continuously updated content
- Paid advertising (online or physical, including billboards)
- Social media profiles and content
- Medical society participation
- Community engagement (through events and partnerships, for example)
- Referring partner contacts
- Third-party marketing support (if needed)

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Supplies and Materials

Medical equipment considerations:

- Basic clinical supplies (including gloves, masks, handwashing requirements, alcohol prep pads, stethoscopes, bandages and gauze, and equipment to take vital signs)
- Office supplies (such as computers, label printers, pens, and books for CPT and ICD-10 reference)
- Exam room equipment (examination or procedure tables, otoscopes, weight and height scales, sharps containers, and privacy curtains, for example)
- Diagnostic and POC testing tools (such as a spirometer, doppler, glucometer, and other basic lab supplies)
- Procedure-based supplies (suture or wound care kits, for example)
- Emergency equipment (like AEDs, oxygen delivery systems, a crash cart, and emergency medications)

Furnishing considerations:

- Desks and office chairs
- Waiting room seating and tables (or child-based amenities like a play structure)
- Filing cabinets and a cash safe
- Break room amenities (including a refrigerator and dining furniture)
- Wall and spatial decor

Material considerations:

- Letterhead paper and business envelopes
- Business and/or appointment cards
- Prescription pads
- Practice brochures and procedural fliers
- Patient record forms (including medical history, authorization to treat, HIPAA acknowledgement, financial policy, release of information, and referral forms)
- Official return to school or work notes
- Patient education take-home materials