

PRACTICE STARTUP GUIDE

A CHECKLIST FOR KEEPING YOU ON TRACK

DERMATOLOGY
 **AUTHORITY**

9-12 MONTHS

- Build your professional team
 - Practice management consultant
 - Legal advisors (corporate structure, facility lease, contract review, human resources, etc.)
 - Financial advisors (CPA and banking executives)
 - Architect/contractor (if applicable)
 - Marketing firm (digital, branding, web design, collateral, etc.)
- Determine corporate structure
- Do name and URL search to determine practice name (including available names under government website)
- File for company formation (note that products may be sold to assure sales and use license is obtained)
- Investigate city and county licenses and permits
- Create a business plan and proforma
- Review lending options and obtain financing/lines of credit
- Review non-compete agreements (if applicable) to make sure you are not in violation
- Use demographic and competition analysis to identify practice location
- Negotiate lease or seek mortgage
- Negotiate web development agreement (make sure ownership transferred)
- Design layout and office flow
- Create office renovations required timeline
- Determine utility requirements based on equipment
- Open personal and business checking and savings accounts
- Financing accounts
 - Business plan with budget
 - Secure line of credit
 - Personal finances
- Acquire and establish a domain name
- Understand and isolate key elements of insurance credentialing (government and private) and licensure
 - DEA
 - NPI numbers
 - Secretary of State
 - Malpractice insurance
 - Board of Medicine/Education Department/Office of Professions
 - Employer tax ID (EIN) numbers
- Obtain Medicaid and Medicare provider numbers
- Obtain state medical license or submit change of address
- Obtain other insurances

6-9 MONTHS

- Professional team meeting throughout the process
- Make a list of needed medical and office equipment, the larger items specifically include:
 - Patient Management System demo
 - EHR demo
 - Telephone (HIPAA compliant)
 - Office equipment
 - Exam room equipment
 - Office furniture
 - Dictation system
 - Special medical equipment
- Solicit and review construction bids (if applicable)
- Consider hiring a construction manager (if applicable)
- Implement a secure phone/fax service/ high-speed internet service
- Determine practice services and associated fees
- Develop fee schedule
- Arrange for professional malpractice insurance
- Arrange for telephone/fax # (need for credentialing)
- Confirm mailing address and suite number before credentialing
- Arrange for lockbox or check scanner
- Contract with a credentialing company, obtain managed care provider applications or notify change in provider status
- Complete and mail managed care applications or notify for existing practice
- Submit applications for hospital privileges or change in provider status
- Set up computer software demos for patient management system and EHR
- Check deadline for submitting Yellow Pages advertising
- Interview billing companies
- Start the credentialing process with all private and public health plans
- Look into IT education and vendors
- Finalize complete budget and business plan
- Obtain licensure for ancillary services
- Request and complete applications for the following professional organizations:
 - [Your State] Medical Society
 - [Your County] Medical Society
 - [Your Specialty] Medical Society
 - American Medical Association (AMA)
- Compliance comprehension and clearance
- Begin to develop a brand strategy including:
 - Vision
 - Value proposition
 - Logo design
 - Print/digital marketing materials
 - Website/content creation and layout

3-6 MONTHS

- Meet with advisors to determine and evaluate benefit plans for you and your staff
- Select/order software
- Make your IT selections: Patient management system, EMR, servers, terminals and equipment • EMR election, system education, demo and review
- Secure vendors and providers
- Arrange for hospital privileges
- Look into IT education and vendors
- Assess, seek, and order any additional furniture or equipment
- Review and/or arrange for office business insurance coverage
 - Office overhead
 - Office liability
 - Business interruption
 - Employee fidelity bond
 - Office contents
 - Umbrella policy
 - Workers' compensation
 - Health
 - Disability
 - Life
- Review federal and state patient privacy laws and develop policies and forms:
 - Notice of privacy practices (if HIPAA applies) (on website and intake paperwork)
 - Business Associate Agreements(BAA) with vendors (if HIPAA is applicable)
 - Intake paperwork:
 - Patient Financial Responsibility Agreement (private pay, late fees, bounced payment charges, collection costs)
 - Out-of-network disclosures (as applicable)
 - Late/missed appointment policy
 - Release forms
 - Credit card forms
 - Cosmetic forms
 - Late/missed appointment policy signage
 - Obtain and install security cameras
 - Finalize computer software, telephone and office/medical equipment training schedules
- Obtain the following services:
 - Paging
 - Answering service
 - Document destruction
 - Medical waste
 - Dictation
 - Dropbox
 - Credit cards
 - Billing

3-6 MONTHS cont.

- Janitorial
- Building maintenance
- Security service
- Laundry service
- Identify and order office/medical supplies
- Set up FedEx account
- Develop medical assistant training
- Determine what jobs and positions will be necessary for the office, and write the descriptions
- Create employment agreements and/or confidentiality & non-disclosure agreements for certain staff
- Create employee handbooks and HIPAA training materials/acknowledgments
- Notify patients if they are transferred from previous office

FINAL 3 MONTHS

- Hire employees with specific job descriptions—including office practice manager—ensuring interview and background check legal compliance
- Telephone system, furniture, office equipment and medical equipment: finalize prices and obtain bids, if necessary
- Develop list of office forms needed to be ordered and printed, or to be ordered as standard forms
- Notify pharmaceutical reps. and other appropriate sales personnel that you are opening a new practice
- Place orders, if needed for all medical supplies and surgical supplies
- Order CPT, HCPCS and Correct Coding Initiative books
- Employ required staff and establish their job descriptions/responsibilities
- Employee handbook and regulatory posters
- Develop practice marketing plan
- Have salary structures and pay rates
- Order the following:
 - Magazines
 - Newspapers
 - Information brochures
 - CPT book
 - ICD-9 book
 - PDR
- Implement OSHA compliance
 - Blood borne pathogens
 - Handling sharps
 - Hepatitis B protection
 - Contamination
 - Personal protection equipment
 - Reporting exposure incidents
 - Hazard communication standard
- Develop and implement strategy for printed collateral, website, advertising, press releases and other forms of potential patient marketing
- Arrange transcription, if needed
- Have outside reference lab
- Join local societies
- Set up patient portal
- Obtain HIPAA privacy and security, OSHA and CLIA manuals
- Order signage, both indoor and outdoor
- Physician coding tip sheet
- Have email accounts for staff
- Set up billing and collection services
- Physician networking, introduce yourself
- Purchase domain name

FINAL MONTH & WEEK

ONE MONTH OUT

- Place office and medical supplies
- Arrange for physician coverage
- Draft, finalize and print practice super bill or encounter form
- Develop medical record filling system
- Obtain medical and office equipment, and office furniture
- Finalize office opening announcements
- Order forms: new patient, patient billing statements, prescriptions, appointment cards, etc.
- Finalize all IT selections, confirm vendor delivery dates and training seminars
- Arrange payroll services and employee benefits
- Introductory orientation for the team
- Schedule testing for Medicaid/Medicare electronic billing
- Draft, finalize and print hospital/surgical charge ticket
- Have necessary wage and hour and all other employment regulations, including required postings
- Create office policies, procedures, manual and employee handbook
- Order lab coats, staff uniforms and nametags
- Review that all essential elements are complete and in place to move forward
- Plan for an open house/ribbon cutting
- Line up press releases
- Arrange with delivery vendors such as liquid nitrogen
- Employee meeting to review and discuss policy manual and office operations
- Mail out announcements to physicians, pharmacists, hospitals and professional organizations
- Place print announcements in local newspapers
- Select list of referring doctors
- Design/build website (outsource to Dermatology Authority)
- Create branded collateral (outsource to Dermatology Authority)

ONE WEEK OUT

- Review checklist
- Enter practice in Google My Business
- Walk through office to inspect equipment, furniture, etc.
- Make sure employees are adequately trained on new computer, telephone and office systems
- Install credit card machines
- Notify reps location is now open

FINAL MONTH & WEEK cont.

- Final check computer system
- Meet with staff to resolve any last minute issues
- Conduct practice office visits with staff, friends or family as stand-in patients

POST OPENING

- See first patients with reduced schedule and gradually open more available appointments.
- Set up social media platform(s) during the first 90 days post opening (capture content in those 90 days)
- Determine which marketing channel you will use to reach prospective patients: social media, paid search ads, SEO (consult with Dermatology Authority)

Please note: These are estimated time frames for starting a practice. They are subject to change, and each practice may vary.