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Medical Practice Startup Checklist

Organizational and Physician Issues	Designated Responsibility	Date Started	Date Completed	Comments
Selection of Legal Firm, Accounting Firm, Start Up Consultant				
Evaluate organizational options				
Selection of Entity and Entity Formation				
Coordinate entity name reservation				
Obtain federal tax I.D. number				
Select a date to begin practice				
Finalize and execute recruitment contract, if applicable				
Structure Buy/Sell Agreement, if group practice				
Structure Employment Agreement				
Negotiate withdrawal from existing practice, if applicable				
Physician Compensation Model and Employment Agreements, if group practice				
Apply for state and local tax identification numbers				
Selection of Legal Firm, Accounting Firm, Start Up Consultant				



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Location Analysis and Space Planning	Designated Responsibility	Date Started	Date Completed	Comments
Conduct location analysis				
Determine space requirements				
Select location				
Negotiate lease terms				
Office lease reviewed by legal counsel				
Execute office lease				
Design office layout				
Evaluate space plans				
Prepare construction documents				
Obtain competitive bids				
Review Owner-Contractor Agreement				
Construction administration				
Complete room by room fixed asset needs list				
Interior Design				
Coordinate Move-in				
Coordinate Signage				



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Hospital Support Package	Designated Responsibility	Date Started	Date Completed	Comments
Solicit hospital support packages				
Evaluate hospital support packages				
Negotiate hospital support packages				

Credentialing and Privileging Issues	Designated Responsibility	Date Started	Date Completed	Comments
Determine present participation in plans & hospital privileges				
Submit applications for hospital privileges				
Obtain managed-care provider applications or notify of change in provider status				
Prepare Medicare and Medicaid provider application				
Complete and mail managed-care provider applications or notify for existing practice				
Obtain membership in state medical association				
Obtain membership in county medical society				
Obtain/transfer state medical license				
Obtain/transfer federal narcotic license				
Obtain/transfer state narcotic license				



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Financial Planning, Accounting and Billing Issues	Designated Responsibility	Date Started	Date Completed	Comments
Prepare cash flow projection				
Prepare furniture & equipment budget (see location planning above)				
Determine loan financing requirements				
Prepare loan request summary				
Select banks to submit loan request				
Determine banking services needed				
Present loan summary to banking institutions				
Negotiate loan/services				
Prepare and review personal financial statement				
Open practice checking account				
Coordinate merchant credit card account				
Purchase credit card machines				
Set up accounting system and related training				
Set up practice internal controls				
Decide on petty cash policy				
Schedule testing of Medicare/Medicaid electronic billing				
Select collection agency				
Employee bank reconciliation training				



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Fees and Coding	Designated Responsibility	Date Started	Date Completed	Comments
Review usage of evaluation & management codes				
Develop office charge ticket				
Telephone survey of selected fees				
Develop hospital charge ticket, if applicable				
Development of practice fee schedule				
Conduct CPT and ICD-9 training				

Computer/Software Selection	Designated Responsibility	Date Started	Date Completed	Comments
Define hardware & software requirements (e.g. PPM, EMR, imaging)				
Select qualified vendors				
Prepare requests for proposal				
Coordinate demonstrations				
Evaluate proposals				
Negotiate purchase agreement				
Negotiate service agreement				
Coordinate installation				
Coordinate conversion				
Coordinate system set-up (e.g. Payer codes, payer classes)				
Finalize computer training schedule and implementation timeline				
Make sure all employees are adequately trained on new computer system				



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Telephone System Selection/Communications	Designated Responsibility	Date Started	Date Completed	Comments
Define hardware needs (e.g. voice mail)				
Determine lines/features needed (e.g. cable modem/DSL)				
Obtain telephone number				
Coordinate remote call forwarding				
Coordinate installation of lines				
Select vendors for bids				
Evaluate bids				
Order equipment				
Place order for yellow pages ad				
Place order for white pages				
Select answering service				
Select paging service				

Other Equipment Planning	Designated Responsibility	Date Started	Date Completed	Comments
Review Needs				
Prepare furniture & equipment budget				
Determine acquisition schedule				
Submit major items for bid				
Evaluate bids				
Order office furniture				
Order medical record filing system				
Obtain quotes and order photocopier, typewriter, fax machine				
Obtain quotes/order transcription equipment				
Obtain quotes/order examination room equipment				
Obtain quotes/order laboratory equipment				
Obtain quotes/order other clinical equipment				
Obtain quotes/order refrigerator, microwave, break room furniture				
Obtain quotes/order furniture items (e.g. waiting room, MD office)				
Prepare purchase orders/ Coordinate deposits				
Coordinate review of instruments/smaller items				



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Marketing Issues	Designated Responsibility	Date Started	Date Completed	Comments
Draft practice marketing plan				
Coordinate development of practice logo				
Other direct mail or advertising?				
Draft announcement card				
Order announcement cards				
Purchase office opening announcement in newspaper				
Mail out announcement cards				
Select list of referring doctors				
Select open house date				
Plan details of open house				
Basic brochure development				
Develop newspaper advertising budget				
Coordinate design and placement of newspaper ad				
Coordinate development of yellow pages ad				
Coordinate letterhead/business card design				
If specialist, meet with referring doctors				



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Forms and Supplies	Designated Responsibility	Date Started	Date Completed	Comments
Draft new patient information form				
Order patient account statement				
Obtain office supplies				
Order business cards				
Order office stationery				
Order HCFA forms				
Order patient info booklet				
Order Medicare manual				
Order Medicaid manual				
Order CPT and ICD-9 book				
Order specialty specific coding book(s)				
Order initial stock of medical supplies				
Coordinate with pharmaceutical representatives				



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Office Operational Issues	Designated Responsibility	Date Started	Date Completed	Comments
Prepare office policy and procedures manual				
Train staff in business procedures prior to opening				
Observe staff during first day of operations				
Evaluate initial month end				
Set-up bank deposit guidelines				
Set-up daily financial close out procedures				
Set-up daily/monthly financial reporting				
Set-up appointment scheduling guidelines				
Set-up office charge accumulation guidelines				
Set-up hospital charge accumulation guidelines				
Set-up billing and accounts receivable follow-up guidelines				
Set-up time of service collection guidelines				
Set-up financial policies				
Set-up adjustment guidelines				
Set-up medical records system				
Set-up periodic audit schedule				
Set-up accounts payable procedures				
Finalize financial statement format				



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Insurance Needs	Designated Responsibility	Date Started	Date Completed	Comments
Evaluate insurance needs				
Select agents to submit proposals				
Evaluate any "tail" issues				
Obtain quotes and purchase malpractice insurance				
Obtain quotes and purchase group health insurance				
Obtain quotes and purchase dental insurance				
Obtain quotes and purchase office liability insurance				
Obtain quotes and purchase Workers' Comp insurance				
Obtain quotes and purchase Employee Practices Liability				
Review life insurance for coverage adequacy; Increase coverage, if necessary				
Review disability coverage, if policy exists				
Obtain disability coverage, if necessary				
Obtain overhead disability				
Obtain employee fidelity bond coverage				

Personnel and Benefit Issues	Designated Responsibility	Date Started	Date Completed	Comments
Determine staff positions				
Develop job descriptions				
Develop organizational chart				
Specify salary schedule				
Develop personnel policy manual (PPM)				
Prepare and place advertisements for new employees				
Determine employee benefit package				
Review resumes				
Telephone screening of candidates				
Interview job candidates				
Check references on selected finalists				
Background check				
Make job offer				
Prepare employment acceptance letter				
Prepare employee personnel files				
Employee meeting to review and discuss policy manual and office operations				
Coordinate payroll services				



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Miscellaneous Issues	Designated Responsibility	Date Started	Date Completed	Comments
Select outside reference lab				
Create in-house lab, if applicable				
Implement OSHA compliance				
Implement CLIA compliance if applicable				
Implement HIPAA compliance				
Implement Stark compliance, if applicable				
Arrange for physician coverage				
Order reception room periodicals				
Employee computer training status				
Employee CPT training meeting				
Physician CPT training meeting				
Train staff in universal precautions				
Contract with transcription service				