

L. Appendices

Appendix A: Opening a Practice Checklist

This list is not an exhaustive compilation of everything you need to open a practice, but the checklist includes some key elements that should be considered.

Set up Plan

- Determine where and in what type of practice model you want to practice
- Select a start date to begin practice
- Select professional advisors
- Develop a business plan

Required Licenses

- Obtain necessary medical certifications and licenses (CPSO, OMA, CMPA, WSIB)
- Obtain your OHIP billing number

Setting up business: (Financial)

- Obtain a business license
- Prepare budget for setting up business
- Negotiate financing, if needed
- Open business chequing account
- Petty cash management
- Purchase/lease point-of-service payment terminals if needed
- Evaluate insurance needs
- Obtain malpractice insurance
- Obtain quotes and purchase group health, dental, office liability, WSIB insurance
- Obtain life insurance and disability coverage if necessary

Location and Space Planning

- Determine space requirements
- Find office location to lease/buy
- Negotiate office lease terms (Have a lawyer review the office lease contract)
- Evaluate space plans
- Coordinate move-in
- Coordinate signage

Staffing

- Determine staff positions
- Develop job descriptions & determine salary/employee benefit package
- Place advertisement for new staff
- Review resumes, interview candidates
- Obtain credentials, check references and conduct background checks
- Make job offers and create employment contracts
- Set up employee personnel files
- Develop a training manual for employees on office procedures
- Establish communication processes between you and your staff

Hospital Privileges

- Submit application for hospital privileges
- Evaluate and negotiate hospital privileges
- Review the hospital processes and policies

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Furniture and Equipment

- Review needs
- Order office furniture (waiting room, reception, admin area, lunchroom, back office, examination room) based on needs
- Order medical record filing system (if not on an EMR system)
- Order photocopier, fax machine, telephone system, computers
- Order laboratory and clinical equipment

Technology Setup

Computer — Hardware and Software

- Determine hardware and software requirements
- Select qualified medical software vendors
- Negotiate purchase and service agreement (EMR Agreements should be reviewed by a lawyer)
- Coordinate installation
- Coordinate and finalize training and system implementation

Telephone System

- Determine hardware & lines/features needs
- Obtain telephone number(s)
- Organize installation and checks on the lines
- Set-up telephone answering service

Operational Issues

- Prepare office policy and procedures manual including for:
 - daily/monthly financial reporting
 - appointment scheduling guidelines
 - dealing with appointment delays
- Train staff in business procedures prior to opening
- Set-up billing, accounts receivables, account payable procedures

- Set up accounting system
- Set-up Uninsured Services Program
- Set-up medical records system
- Create forms, such as new patient information forms
- Order medical supplies
- Order office stationery (including business cards, letterhead)
- If specialist, contact and meet referring doctors
- Coordinate with pharmaceutical representatives

Advertising and Marketing

- Develop practice logo, letterhead/business card design, prescription pad design
- Draft office opening announcement
- Place order for newspaper advertisement, signs in office, OMA notice
- Do other direct mailing or advertising (e.g., mail announcement cards)

Miscellaneous

- Order reception room periodicals (OMR, magazines, etc.)
- Arrange waste/sharp disposal
- Develop emergency preparedness plan
- Develop emergency exit plan (e.g., location of fire extinguishers)
- CPR training for physician and staff
- Arrange for janitorial services