

Starting a Practice

A Guide for New Physicians

Ontario Medical Association
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A. Introduction

Setting up a medical practice, can be overwhelming - you are now faced with decisions that you never considered during your medical training. This practical guide is aimed at supporting physicians with the business aspect of setting up a practice in Ontario.

Setting up a well-organized medical practice, can reduce your administrative load, so that you can focus on the medical side of your practice.

For more information, contact: Ontario Medical Association

Address: 150 Bloor Street West, Suite 900, Toronto, ON M5S 3C1

Phone: 1.800.268.7215

Email: info@oma.org

Website: www.oma.org

The Guide and its contents (the "Guide") provide general information on the subject matter set out in the Guide's title. The Guide is not intended to provide specific advice as appropriate advice will vary in different circumstances. The Guide has been developed and is owned by the Ontario Medical Association (OMA). The Guide is protected by Canadian copyright law. The Guide shall not be reproduced, published, distributed, sold, posted, communicated, disseminated, broadcasted or otherwise made available without the prior written consent of the OMA.

B. Getting Ready to Practice



Required Licenses and Memberships to Practice

Any physician that plans to practice in Ontario must acquire certain licenses and memberships. Some of these may take up to three months to obtain, so it is important to contact organizations during your final stages of residency to get registration and information packages. These include:

- Your practice license from the College of Physicians and Surgeons of Ontario (CPSO).
[Register here](#)
- Your Ontario Medical Association (OMA) membership
[Register here](#)
- Your OHIP (Ontario Health Insurance Plan) billing number from the Ministry of Health (MOH)
[Register here](#)
- Your Canadian Medical Protective Association (CMPA) Insurance
[Register here](#)
- Royal College of Physicians and Surgeons of Canada (RCPSC)
[Register here](#) (for specialists)
- College of Family Physicians of Canada (CFPC):
[Register here](#) (for family physicians)

Optional associations you can choose to join include:

- [Canadian Medical Association \(CMA\)](#)
- [Ontario College of Family Physicians \(OCFP\)](#)
and/or
- Local medical societies.

B. Getting Ready to Practice

Professional Organizations

College of Physicians and Surgeons of Ontario (CPSO)

The CPSO is the licensing body for all physicians in Ontario and their role is to regulate the practice of medicine to protect and serve the public interest.

- All physicians in Ontario must be members of the College to practice medicine.
- The College has policies on professional obligations and responsibilities that you must adhere to as a practicing physician, such as “Medical Records Management” and “Professional Obligations and Human Rights”.

[For more information](#)

Canadian Medical Protective Association (CMPA)

The CMPA provides medical liability protection that is required while practicing medicine. They support members, when medical-legal issues arise.

[For more information](#)

Ontario Medical Association (OMA)

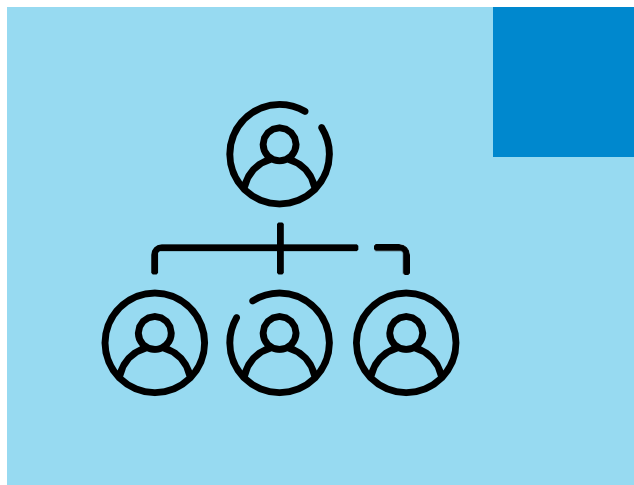
The OMA advocates and negotiates with the provincial government on behalf of physicians. They also have programs to support physicians which include OMA insurance, OntarioMD, Practice Management and the Physician Health Program (PHP).

[For more information](#)

Workplace Safety and Insurance Board (WSIB)

WSIB provides medical coverage and support to help people get back to work after a work-related injury or illness. Physicians are required to communicate the appropriate information to WSIB, for patients to be able to claim their benefits.

[For more information](#)



Information and Privacy Commissioner of Ontario (IPC)

The IPC acts to protect information and privacy rights in Ontario. Patient information is protected by the Personal Health Information Protection Act (PHIPA).

Physicians who act as Health Information Custodians (HICs), regardless of practice setting, are required to track and provide the IPC with an annual report of all privacy breaches that occurred in the previous calendar year. HICs must notify patients upon occurrence when the patient's personal health information (PHI) has been stolen, lost, or disclosed without authority. HICs must also report certain types of privacy breaches directly to the IPC upon occurrence.

[For more information](#)

B. Getting Ready to Practice

Professional Advisors

Your team of advisors will offer invaluable support with the business aspect of being a physician.

Some of these roles include:

- **Lawyers:** They provide you with guidance regarding your contractual obligations, such as assisting with drafting and negotiating your contracts (group contract, staff contracts, leases, etc.)

Contact [OMA Legal Affairs](#) or your lawyer.

- **Accountants/Financial Advisors:** They can provide advice and support you with your business finances. This includes the financial analysis of your business plan, setting up a medical incorporation, taxation, cash flow, investments, risk management and retirement planning.

Contact [MD Financial](#)

- **Insurance:** They can provide guidance on your personal and professional insurance needs.

Contact [OMA Insurance](#) or your insurance provider.

Ideally, select advisors who have experience working with health-care professionals. They can greatly assist in your quest for practice management proficiency and financial security.



Tip: Ask your colleagues for recommendations.

B. Getting Ready to Practice



General Principles of Ontario Health Insurance Plan (OHIP) Billing

This is a general overview provided for information purposes only. You are encouraged to confirm information with MOH.

Physician Registration and the OHIP Billing Number

You must obtain an OHIP billing number to submit claims to the Ontario Health Insurance Plan (OHIP) for services rendered:

To apply for OHIP, you must:

- Hold a valid certification from the College of Physicians and Surgeons of Ontario (CPSO)
- Have an Ontario practice address
You must list every address that you regularly provide insured services for in Ontario. If multiple

addresses exist, you should identify which address is the primary practice site, where possible.

- Complete and sign the [Application for OHIP Billing Number for Health Professionals](#) form
- Provide banking information to support direct payment
- Register for Medical Claims Electronic Data Transfer (MCEDT) and Health Card Validation (HCV) services

It can take up to **15 business days** to process your registration. You may bill retroactively up to three months prior to receiving the billing number but no earlier than the effective date on your certificate.

B. Getting Ready to Practice

Group Number

A group number is not a billing number, it is a number issued by the ministry that allows individual physicians to have their billings associated with a group.

Health care groups can apply for a group number by completing and submitting an '[OHIP Group Registration for Health Care Professionals](#)' form.

Schedule of Benefits for Physician Services

The Ministry makes payments for services insured by OHIP in accordance with the payment requirements listed in the Schedule of Benefits (the "Schedule"). The Schedule lists approximately 6,000 physician services and includes information and conditions for payment of insured services. Particular attention should be paid to the first section of the Schedule, the "General Preamble", which provides detailed information about billing requirements and payment rules.

The Schedule is regularly updated. You should ensure you are referring to the current version of the Schedule to confirm that the services rendered are in accordance with the payment rules in effect at the time the service was rendered.

[OHIP Schedule of Benefits and Fees](#)



Tip: The Ministry regularly publishes INFOBulletins that offer information on payment, program or policy changes with regard to the Schedule of Benefits and/or other payment information.
[Sign up for INFOBulletins.](#)

OHIP Claims Submissions

Method of Submitting Claims

All claims must be submitted through medical claims electronic data transfer (MCEDT) in accordance with Regulation 552, Section 38.3 of the [Health Insurance Act \(HIA\)](#). It will also allow you to validate health cards at the point of care.

You should liaise with your software vendor, to ensure all hardware and software conform to the specifications as contained in the Technical Specifications-Interface to Health Care Systems manual.

Resources:

For information and how to register on [MCEDT](#), refer to [MCEDT Reference Manual](#).

Types of Claims

There are three main types of claims processed by OHIP:

1. *Health Care Payment (HCP)*: Claims for services rendered to a patient with OHIP coverage.
2. *Workplace Safety and Insurance Board (WSIB)*: Claims for services rendered to patients with OHIP coverage who have work-related injuries.
3. *Reciprocal Medical Billing (RMB)*: Claims for services rendered to a patient insured under another Canadian health coverage plan, excluding Quebec.

B. Getting Ready to Practice



Cut-Off Date for Claims Submission

The ministry operates on a monthly processing cycle. Submissions received by the 18th of the month will typically be processed for approval the following month.

Claims must contain complete, valid and accurate information in order to be processed on time. Claims requiring internal review by the ministry may have payment delays.

The ministry recommends daily or weekly submissions of claims to ensure timely adjudication of claims files and to aid in the subsequent reconciliation of rejected claims.

Uninsured Services Billing

An Uninsured Services Program (USP) can provide an opportunity to offset unpaid work. It is a method of billing and collecting for uninsured services.

Resources: [OMA's Uninsured Services](#) for OMA's "Physician's Guide to Uninsured Services" and "Implementing an Uninsured Services Program: A Guide for Physicians".

For more information on billing:

- [Ministry of Health \(OHIP\)](#) Resources for Physicians
- MOH: [Email](#) or 1.800.262.6524
- [OMA Learns](#) for interactive modules on billing in Ontario.
- Email: economics@oma.org for billing questions and Schedule of Benefits interpretation.

C. Deciding Practice Type, Where to Practice and Where to find jobs

Practice Type Options

Should you start your own practice, form a partnership, or join an established practice? There is no right answer to this question.

If you decide to go solo, your start-up costs will be higher, but you will be your own boss and wholly responsible for your practice's success – a draw to some. Start-up costs will be relatively low if you decide to form a partnership, but your business approach may be different from the other partners. If you join an established practice, your start-up costs will be minimal, you will have a smaller administrative load, but you are not your own boss.

Ultimately, consider what style of practice is best suited to help you achieve your professional and personal goals.

Resources:

- [OMA Primary Care Model Overview for New Graduates](#)
- [OMA Primary Care Compensation Models](#)
- [OMA Primary Care Model Comparison Chart](#)
- [HealthForce Ontario - Family Medicine Compensation Models](#)

There are pros and cons to each option, so ask yourself some key questions:



- What kind of start-up costs am I comfortable with?
- Do I want to be a leader or part of a team?
- What type of personality do I feel comfortable working with?
- How much time do I want to spend on administration of my practice?
- Do I want to control my expenses or share them?
- How much control over my schedule do I want?
- If joining a practice, what is the revenue stream?

C. Deciding Practice Type, Where to Practice and Where to find jobs

Considerations when choosing a community.

Where you practice also influences your professional and personal happiness. The community you choose must provide the basis for not only a thriving medical practice, but also for a contented home life for you and your family.

Professional factors to consider include:

- Demand for your specialty or sub-specialty in the community (e.g. is your practice focused on geriatric care yet most of the population demographic is young adults?)
- Access to hospital privileges, diagnostic facilities, support services and consultations (contact hospitals in the community to check the time required to obtain hospital privileges, and availability of surgery time if this is something you want)
- Growth/decline in population and demand for services, and
- Government incentives for locating in the community.

Personal factors to consider include:

- Cost of living (housing, groceries, etc.)
- Social life
- Career opportunities for family members
- Transportation
- Schools
- Shopping
- Social and service organizations, and
- Recreational and cultural facilities.

Resources:

- [HealthForce Ontario - Transition into Practice](#)
- [OMA - Locums in Ontario](#)



Tip: Locum provides you with the opportunity to explore different practice types and locations to determine the best fit for you.

Where to find jobs

Ontario Health - [HealthForce Ontario](#) is a provincial agency tasked with coordinating recruitment of healthcare workers in Ontario. They host an online job board, share recruitment resources, and can support you in your recruitment journey.

Other places to find jobs include:

- [BookJane](#)
- Facebook Groups, such as [Family Physician Job Opportunities - Ontario](#)
- Word of mouth from colleagues.

D. The Planning Process for Start-ups



There are numerous ways to organize a plan, but many include:

1. **Executive Summary:** your mission statement and business goals.
2. **Company Analysis:** Outlines your practice type, governance, risks.
3. **Marketing Plan:** how you will market yourself and put your plans into action.
4. **Financial Plan:** describes key financial data (e.g., expected cash flow, expenses, and profit).
5. **Operational Plan:** putting your plan in place along with timeline.

See Appendix B for a sample business plan outline.

Creating a Plan

There is a saying that “if you don’t know where you’re going, any road will take you there.” In business, your plans become an invaluable road map to your future.

All plans hinge on a key question: What do you want from your career? This will determine the philosophy for your personal and professional goals. Everything that you do as a physician and as a businessperson should be rooted in that mission.

A business plan defines a business’s direction and describes how it plans to achieve its goals.

Writing a detailed business plan will clarify your goals, increase the confidence of your lenders, ensure medical partners are strategically aligned and share key information with your advisors.

Arrange Financing

Work with your financial advisor to develop a realistic start-up budget for the start of your practice. Your business plan should assist you with negotiating your financing and help determine how much you need.

Ensure you have a business emergency fund for unexpected costs that may arise and ensure you have sufficient cash flow to run your clinic, especially in the first few years.

Set up your medical professional corporation (MPC)

Some physicians will incorporate to reduce their taxes. Liaise with your financial advisor to determine if incorporating is financially beneficial to you.

Resource: [OMA Incorporating your medical practice](#)

E. Your Office: Selecting, Leasing, Financing and Equipping

Factors when selecting a location

The location of an office, the building, and the space you need now – and may want for the future – can influence the success of your medical practice. Consider the following factors:

Location:

- High visibility
- Patient access (e.g., public transit)
- Proximity to patients
- Proximity to diagnostic services and other medical facilities (e.g., hospital).
- Proximity to your home



Building:

- Rent per square foot
- Cost of leasehold improvements
- Space is zoned for commercial use and follows building codes (e.g., emergency exits, fire exits)
- Condition and maintenance of building
- Special equipment requirements (e.g., backup generators for fridges, air ventilator)
- Patient accessibility (e.g., wheelchair accessible, elevators, wheelchair bathrooms)
- Parking



Space:

- How much usable space you require
- The space allows for physician public health guidelines (e.g., sinks in exam rooms)
- Expansion potential (e.g., room for potential partners or other services).



This includes specifications for exam and waiting rooms, furniture, medical device reprocessing and storage areas, medication room, and hand hygiene facilities, among others. Incorporating good IPAC measures at the start improves patient and staff safety.

Resources:

- [Ontario Agency for Health Protection and Promotion \(Public Health Ontario\), Provincial Infectious Diseases Advisory Committee. Infection prevention and control for clinical office practice \[Internet\]. 1st revision. Toronto, ON: Queen's Printer for Ontario; 2015 \[cited 2022, Oct 11\].](#)
- [College of Physicians and Surgeons of Ontario: Out-of-Hospitals Premises \(OHP\) Standards](#)
- [Accessibility Requirements for Health Care Providers](#)
- [Canadian Standards Association: CAN/CSA-Z8000-18 Canadian health care facilities](#)
- [Canadian Standards Association: CAN/CSA Z317.2:19 Special Requirements for Heating, Ventilation, and Air Conditioning \(HVAC\) Systems in Health Care Facilities](#)
- [Canadian Standards Association: CAN/CSA-Z314-18 Canadian medical device reprocessing](#)
- Your local Public Health Unit and Public Health Ontario can help answer your questions.

When renovating or moving to new clinical offices, you must be aware of current municipal regulations for premises as well as standards from the Canadian Standards Association (CSA).

E. Your Office: Selecting, Leasing, Financing and Equipping

Your Lease

Relocation costs can be substantial. As such, ensure that the space meets your needs. It is always better to have more space than you think you presently need, as many practices grow over time.

Before approaching the landlord, speak to other tenants of the building, get references, and prepare a written summary of your requirements.

Ask the landlord to provide preliminary space planning services, to show how the available space could look incorporating your requirements. Have your interior designer/construction consultant review the landlord's proposal and prices. Determine the actual cost of leasehold improvements before you decide on how to finance them.

The lease documents prepared by the landlord should include all aspects of the "offer to lease". For example, it should include termination conditions, renewable conditions, leasehold renovations, building maintenance (elevators, snow removal etc.), parking maintenance, utilities (HVAC maintenance etc.) force majeure clause, and way that the rent would be calculated (gross, net, double net, triple net, percentage). It is critical that all details are in writing and incorporated into the lease contract.

Legislation for commercial leases is different than residential leases and your lease represents a large financial liability, so it is imperative to have your lawyer review the lease, to ensure that it contains all relevant information and negotiate any amendments required.



Office technology, equipment and supplies needed

The nature of your practice will determine your needs.

See Appendix C for a list of common items used in many medical practices.



Tip: Check out [OMA's Advantage Program](#) for discounts and online directory of providers in your community.

A well-designed, well-staffed, and patient-centred area will make a positive impression on patients. It also produces a cost-effective, efficient run office space.

Resources:

- [OMA - Medical Facility Planning Guide](#)
- [OMA - The Patient Experience](#)

F. Human Resources Management

Staff needed to run the clinic

Delegating tasks to others, allows you to concentrate on patient care. As such, hiring staff who have the skills to support you are critical to the success of your practice.

To figure out what staff you need, start by analyzing the areas where you could best use support - What tasks can you delegated? How important are they? How much responsibility are you prepared to delegate?

Many jobs in a physician's office require a combination of skills, so defining the skills that will best satisfy the needs of the practice will help you determine the right staff for your practice.

Be mindful of [CPSO's guideline for delegation of controlled acts](#)

Hire the best staff for the role

Having decided on your staffing needs, you should use a systemic process to select the right candidate.

1

Create a job description.

the skills, responsibility, and authority required for the role. It should also include the job conditions (e.g., in person, work hours).

2

Post the job.

Common places to post your job for medical staff include:

- online job boards (e.g., indeed.ca, monster.ca, eluta.ca),
- on community college job boards,
- recruitment agencies in your community
- word of mouth.

3

Interview and evaluate candidates.

Use questions that will illicit the information that you are seeking about the interviewee and create a rating form to compare candidates based on the key skills you are seeking.

4

Determine compensation.

5

Check references.

6

Offer employment to your chosen candidate.

F. Human Resources Management

Determining compensation for staff

Compensation, which includes salary and benefits, will be the most expensive component of your overhead costs; therefore, it is advisable you seek legal and financial advice.

Salaries are determined by several factors, including position responsibilities and location.

- A quick online search of “salaries for medical office staff in (specify your geographical area)” will provide you with some resources on current salaries.
- You can speak with colleagues in your practice location and/or recruitment agencies.

OMA does not recommend or endorse any website or organization.

Hiring Offer Letter and Employment Contract

Once you have chosen a candidate, prepare an offer of employment letter. The letter should outline the salary, pay cycle (weekly, bi-weekly or monthly), the start date, work hours, job title, copy of the job description, probation period and employee benefits (e.g., vacation entitlement, sick days, health insurance.)

It is prudent to review the offer letter and employment contract with your legal advisor or OMA Legal Services at legal.affairs@oma.org. The OMA recommends that you have written contracts with all employees. Contracts should be signed prior to the first date of employment.



Onboarding

- Set up payroll, taxes, employment insurance (EI), and benefits for your employees.
- Employee Orientation: tour of facility, introduce other staff and give them the tools required for their job (e.g., computer, phone.)
- Train your staff in your business processes (phone etiquette), work-place policies (e.g., patient confidentiality), safety standards (WHIMIS).
- Train your staff on delegated tasks (billing, patient filing etc.)

Managing staff and the work environment

- Set up regular meetings to discuss their performance, training, and satisfaction.
- Foster a safe and respectful work environment. Happy staff will cost you less in the long run (better job performance, lower staff turnover) and will support the success of your clinic.
- Continue to train your staff in skills that will improve your practice (e.g., patient de-escalation, billing).

F. Human Resources Management



Assessing Performance

An important management tool is regular performance appraisals (e.g., annually, semi-annually). These appraisals must be based on the employee's performance compared directly to the job description. The job description may change over time to meet the needs of the office (with the agreement of the employee).

Termination

Terminating an employee is sometimes necessary but never easy. The Employment Standards Act (ESA) defines the termination requirements that you must follow in Ontario. The rules are complex so review with your legal advisor before proceeding.

Resource: [Employment Standards Act](#)

Additional information:

- Information and templates on hiring and managing your staff, OMA's "[Managing your Medical Office Staff: An HR Guide for Physicians](#)"
- [Employer Resources from Government of Canada](#)



Tip: The costliest resource in a medical practice is your time. Hiring staff to reduce time you would spend on certain tasks would be financially beneficial to the practice.

G. Operational Systems



To transform your business plan into action, you will need to create operational processes and policies for your medical practice. Creating processes may seem time-consuming, but will help your practice run smoothly, reduce future problems and minimize administrative/business tasks.

Some systems you may need to set up and create processes for include:

- Patient appointment scheduling system
- Medical records system
- Accounting system (includes billing, accounts receivables, account payable procedures, financial reporting)
- Uninsured services program/costing

Your office manual should include:

- Staff policies (e.g., employee conduct, leaves)
- Patient policies (e.g., patient code of conduct)
- Job processes (e.g., telephone etiquette)
- Workflow processes (state who is responsible for tasks, when and how often tasks should be completed (e.g., receptionist checks office supplies the first week each month.))

You will need to train staff on business procedures prior to opening.

You will need to create commonly used forms (e.g. patient intake form, appointment cards) and obtain/create commonly used patient educational materials (e.g. diabetes care)

See Appendix D for templates

Continuous Planning

Running a business is not static. From the day you open, to the day you close, continuously seek ways to improving your practice processes. Your staff can assist you with improving the practice, so ask for their input.

Resource: [OMA Practice Efficiency Resources](#)

Finding other healthcare providers in the community

It is important to connect with other healthcare providers, that your patients may use, prior to opening (e.g., pharmacists, specialists/family physicians, diagnostic facilities, social worker). Some ways to do this include:

- [OMA Practice Announcement Services](#)
- [Search CPSO physician's database for specialist/family physicians in your community](#)
- Search for healthcare providers close to your clinic (e.g. pharmacist).

H. Marketing

Getting Patients

You cannot have a successful practice without patients. The College of Physicians and Surgeons (CPSO) states that physicians must employ a first come, first serve approach in accepting patients into their practice. Some ways to get patients include:

- [HealthCare Connect](#) - A provincial website to assist patients finding a primary care physician. Ensure you are registered on their website.
- EMR e-referrals. Add your name to EMR e-referral systems, such as Ocean eReferral Network.
- Web presence – Many potential patients will search online for physicians. Create a user-friendly website and/or social media presence to reach potential patients. Create a google business listing for your practice. A web designer can assist you with setting up your website.
- Ask for referrals from other local healthcare providers, such as pharmacists or physicians closing their practice in your community.
- Word of mouth from current patients - Delivering quality service to your current patients will encourage the promotion of your practice to their networks.

- Advertise - Be visible, by having signs in your practice window, mail out flyers/brochures, take an ad in a local newspaper and/or local community boards. A graphic designer can assist you in creating promotional materials.

Your promotional materials must follow CPSO's policy on advertising and social media.

Resources:

- [CPSO's Policy of accepting new patients](#)
- [CPSO's Policy on Advertising](#) and [Social Media](#)



Tip: It will take time to build up your patient roster, so be patient. To prevent future burnout, be mindful of how many patients you accept.



I. Patients



Patient Communication

Effective communication is a critical aspect of a physician-patient relationship. It aids in diagnosing and managing your patients. Some ways to build a strong relationship with patients include:

- Be clear about your practice policies (e.g. frequent no shows, not allowing abusive/threatening language to be used)
- Show respect and genuine care to your patients, including listening without judgement to their concerns
- Take into consideration your patient's living circumstances when discussing test and treatment options
- Ensure the patient understands what you said, by being specific, explain in non-medical terms and asking the patient to confirm their interpretation of what you said.

Conduct

The patient-physician relationship is governed by CPSO's professional standards. These standards include:

- Physician's behavior in a professional environment
- Confidentiality of patient information (PHIPA) and what to do if there is a breach
- Terminating a patient, who exhibits inappropriate behaviour, including abusive or threatening language.

Resources

- [CPSO Policies](#)
- [CPSO Physician Patient Relationship Policy](#)
- [Government of Ontario Personal Health Information Protection Act \(PHIPA\)](#)
- [Information and Privacy Commissioner of Ontario \(IPC\)](#)

J. Setting up for success

In 2021, **72.9%**
of physicians, surveyed
by OMA, stated they
experienced some level
of burnout.



As you start your career, it is important to build a practice that also ensures your well-being.

Some solutions may include:

- Establish a schedule that allows for self-care basics: rest, nutrition, exercise, social support
- Establish work-life balance through flexible work arrangements, such as virtual visits
- Create a positive work environment at your workplace
- Find a support system
- Keep learning
- Streamlining tasks to be as efficient as possible from the start of your career
- Connect with OntarioMD, to make digital health tools a seamless part of your workflow
- Be mindful of your patient size

Burnout signs

It is important to recognize and act at the first signs of burnout. Common signs include:

- Feelings of alienation from work-related activities
- Headaches, stomach aches or intestinal issues
- Emotional exhaustion
- Having difficulty doing everyday tasks at work or at home

OMA's [Physician Health Program \(PHP\)](#)

Anonymously supports physicians, residents, medical students and their loved ones with their mental health difficulties including substance use disorders and burnout. They match callers to community services. PHP is not a crisis service.

- Support Networks in Ontario
 - [Ontario College of Family Physicians Communities of Practice](#)
 - [Ontario College of Family Physicians The early years podcast](#)
 - Physician Facebook groups
- [OMA News Release: Increased burnout & 5 proposed solutions](#)
- [CMA Burnout 101: Signs and Strategies \(put this as the Link](#)

Financial Planning

Financial concerns are a major stressor in today's world. Determining your financial goals (paying debt, buying a home, retirement, vacation etc.), your risk tolerance and your budget from the start of your career is a way to achieve your personal and professional goals and reduce your financial stress. It is advisable to regularly review your financial plan as your earnings, goals and risk tolerance may alter during your career.

Resource: [MD Financial](#)

K. Conclusion

With careful planning, you can start your career, on a path that allows you to meet your personal and professional goals.

This material is provided to assist you with starting your practice in Ontario but is not a substitute for the advice (including legal and financial) you will need from your own professional advisors.



To guide your planning, consider the sequence of steps that will culminate in opening your practice.

1 – 2 years

- Philosophy and goals - think about your mission statement “what do you want from your career?”



6 – 12 months

Envisioning your practice

- Determine where and what type of practice you want to work in
- Develop your business plan
- Find professional advisors to help you make a smooth transition into practicing medicine
- Connect with medical mentors who can provide you with advice from your career?



2 – 4 months

- Obtain all necessary licenses and/or memberships needed for practicing medicine, including hospital privileges
- Start the process for obtaining your OHIP billing number if you do not already have one
- Get acquainted with the OHIP Schedule of Benefits
- Establish your financial systems (accounts payable, accounts receivable and payroll systems with the help of your accountant)
- Develop your Uninsured Services Program if applicable
- Order clinical supplies
- Develop an office policies and procedures manual
- Start the hiring process (posting job)
- Determine your office hours based on the needs of the community and any contract obligations
- Plan your appointment scheduling system and decide how many patients you will see each day and appointments lengths. You will need to review, as your practice becomes busier, so include flexibility in the schedule.



4 – 6 months

- Find a space for your practice. You may consider hiring a medical office designer help with your office layout and design.
- Acquire financing
- Research medical office equipment options
- Assess your technology (hardware and software) needs
- Obtain an office telephone number and an office website address
- Determine your staffing needs

1 – 2 months

- Hire and train staff
- Familiarize yourself and your staff on the EMR system, OHIP Health Card validation, OHIP, WSIB and Uninsured Services billings, Infection Prevention and Control (IPAC) training, patient communication etiquette (in person and telephone)
- Arrange insurance needs for the practice (e.g., disability, office overhead/liability, employee group benefits, business interruption, office contents)
- Set up business bank accounts, and review your financial plan with your financial advisor
- Starting advertising your practice
 - Set up your website and email
 - Send out any opening announcements (e.g., local newspaper, community board, other health care providers, OMA announcements)
- Meet with referring physicians, allied health care providers and pharmacists to whom you could refer patients.
- Contact with your local public health unit to get familiar with local resources and guidance.
 - Know the contact information for your local Public Health Unit should there be exposure to a communicable disease
- Have your phone line, fax line connected
- Arrange for business services and supplies as needed
 - janitorial services
 - sharps disposal
 - snow removal and yard services
 - laundry service
 - handyman
- Create/obtain resources as needed (e.g. signs in the waiting room, information resources for patients) You can ask colleagues for their patient resources for ideas
- Subscribe to magazines for your reception area.



1 month

- Announcements
 - Mail office-opening announcements.
 - Put up your office sign and place your office opening notice in the local newspaper(s).
- Take delivery of all equipment and supplies and start setting up your office.
- Establish a petty cash fund
- Begin accepting appointments from patients.



Acknowledgements

- Send thank you notes to everyone who helped you throughout the process
- Do not forget one final acknowledgement: congratulate yourself!

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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

Appendix B: Business Plan Outline & SWOT

This sample template is geared at starting a medical practice. This is for guidance only.

Executive Summary

- Brief summary of plan that includes:
- Who you are - business name, contact information, start date
- What you will be offering,
- your target audience,
- your management team,
- financial and marketing summary and
- projected milestones

Company Analysis

- Business name, contact information, start date
- History (if applicable)
- Outline the type of practice and services you will be operating
- Ownership, governance and operating structure
- Value Proposition/Your mission statement
- Your objectives
- Long Term operational goals/milestones
- Assumptions and risks
- Partnerships or alliances with other healthcare providers

3. Marketing Plan

- Product: what medical services will you be offering
- Target market: size and growth
- Analysis of competition: amount and type of medical offices in the community
- Advertising /promotional plan

4. Operations Plan

- Organizational structure
- Regular Short-term (daily, weekly, monthly, quarterly) plan
- Technology Plan (equipment, software needs)
- Billing and medical record storage plan

5. Financial Plan

- Projected income statements
- Projected cash flow analysis
- Projected balance sheets

6. Summary

7. Appendix

Include supporting documents such as:

- Management structure
- Financial plans
- Operational processes
- Detailed assumptions underlying the plan

References

<https://www.investopedia.com/terms/b/business-plan.asp>
<https://www.bplans.com/family-medicine-clinic-business-plan/>
<https://articles.bplans.com/how-to-write-a-business-plan-for-an-outpatient-medical-practice/>
<https://www.growthink.com/businessplan/help-center/medical-practice-business-plan>

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SWOT Analysis in Healthcare Example

A SWOT analysis in healthcare allows a medical practice to explore internal strengths and weaknesses as well as external opportunities and threats.

Internal Strengths (S) Excellent location Good brand name (patients' satisfaction) Ability to offer same day /next day appointments Low staff turnover	Internal Weakness (W) Billing is not optimal Physician conflicts with weekend/ after care scheduling Unclear office procedures Lack of comprehensive group governance policy/contracts Difference in governance goals
External Opportunities (O) Diagnostic labs are close to the clinic Pharmacist is close to the clinic Successful referral program with specialists Strong security for patient information/ patient confidentiality	External Threats (T) Diagnostic labs results take long to get Unable to find more physicians to join practice

[More information on SWOT analysis in healthcare](#)

Appendix C: Medical Supplies

Office technology, equipment and supplies needed

The nature of your practice will determine your needs. Below is a list of some commonly used items:

Software systems:

- Accounting software system (assist with tracking invoices/bills, payments received, taxes, cash flow)
- Medical billing system (aligns with OHIP requirements)
- Patient appointment scheduling (include patient online booking system that connects with staff's master schedule)
- Electronic Medical Records (EMR) - see below for more information

Hardware:

- Printer/fax machine, photocopying machine
- Computer with keyboard, mouse
- Headset/speakers for virtual visits/receptionists
- Shredder
- Reliable Internet
- Server/Networking Equipment (for larger clinics)
- Extension cords, Surge protectors
- Telephone System (different lines, features, voice mail)

Office supplies:

- Filing cabinets for patient files
- Printer paper, file folders
- Prescription pads, letterheads, Business cards, appointment cards, name stamp
- Clipboard, pens, petty cash box, paper clips, stapler, envelopes, tape, tape dispenser, scissor, wastebaskets,

Furnishings for reception:

- Waiting Room Area: Chairs for patients, magazines, magazine holder, end tables, artwork, television, books/toys for children, clock, waste basket, hand sanitizer, masks
- Reception: desks, chairs
- Fire extinguisher

Furnishings for staff kitchen:

- Microwave, fridge, sink, drinking water,
- Coffeemaker, coffee, tea, creamer, sugar
- Cutlery, kitchenware (cups, plates)
- Table/chairs
- Paper towels, dish soap

Furnishings for restroom:

- Paper towels/dispenser
- Soap/soap dispenser
- Waste basket
- Feminine hygiene bin
- Urine sample supplies

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Common clinical equipment for physician office/exam room:

- Exam table
- Swivel stool
- Exam light
- Utility table
- Step stool
- Patient gowns
- Syringes, needles, tweezers
- Protective Equipment: Gloves, masks, eyewear, hand sanitizer
- Basic Diagnostic Equipment: Stethoscope, otoscope, pulse oximeter, ophthalmoscopes, colposcopes, blood pressure monitor, thermometers, blood test kits, reflex hammer, eye chart, scale
- General wound care: cotton swabs, adhesive bandages, antiseptic wipes, gauze, tissues,
- Emergency equipment: External defibrillator, aspirators, oxygen canisters, oxygen masks, a resuscitation bag or mask, airway suction unites, foil blankets, trauma board, ventilators, naloxone, epinephrine, salbutamol
- Refrigerator for medications
- Public health vaccines, public health swabs
- Lab pick up resources (e.g. urine cups, labels etc.)
- [Modern sterilizer](#) (autoclave)
- Containers to store used needles/hazardous materials (and accompanying [Hazardous Waste Information Network](#) (HWIN) number)

Ongoing Services:

- Hazardous Waste pickup
- Office Cleaning services
- Handyman
- Pharmaceutical Contacts to get samples

Electronic Medical Records (EMR) systems plan

The Electronic Medical Records (EMR) are patients' digital medical information. Benefits of digital records include more coordinated patient records between healthcare providers, more legible documentation and better tracking of patient care (e.g. prescribing).

To get the right EMR for your needs, determine what your needs are. It is a good idea to review several EMR systems and to talk to other physicians to determine the best software for you.

OMA recommends your legal counsel review the EMR service agreement prior to signing.

When reviewing EMRs, discuss installation and training for you and your staff on the EMR features. Spending time learning about your EMR features at the start of your career, will save you administration and data management time in the long run. Some elements of EMRs include:

- **Digital Health Drug Repository (DHDR)** - real-time, secure access to publicly funded drugs and pharmacy services, all monitored drugs and COVID-19 vaccination information.
- **eConsult** - timely access to specialist advice and often eliminates the need to send patients for an in-person specialist visit.
- **eForms** - eForms automate form completion (e.g., the Ministry of Transportation's Driver Medical Review, aka "fitness to drive" form). You can submit them electronically from your EMR.
- **Health Report Manager (HRM®)** -securely delivering many report types and ADT messages, such as discharge summaries and COVID-19 vaccination reports, from hospitals and specialty clinics to your EMR.
- **Ontario Laboratories Information System (OLIS)** - Access lab results for your patients or perform patient queries in OLIS from your EMR.

Resources:

- [OntarioMD: List what each certified EMR vendor offers](#)
- OntarioMD support physicians find the right EMR tools for their practice and training
- eHealthOntario provincial organization to support sharing of information via EMRs

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Appendix D: Patient Form

Based on CPSO's policy

First Name: _____ Middle Name: _____

Last Name: _____ OHIP No.: _____

Date of Birth (dd/mm/yyyy): _____ Gender: _____

Phone No: _____ Email Address: _____

Address: _____

Emergency Contact Person: _____ Relationship to you: _____

Phone No: _____

Reason for visit: _____

Medical History: (diagnoses, surgeries)

Current Medications: (list name, dosage and frequency of any current medication)

Allergies to any Medication: _____

Appointment Card Template

Dr. _____

[Address]

[Phone No.]

Appointment Card

Date: _____

Time: _____

Notes: _____

If you are unable to keep the appointment, please contact us at least 24 hours prior to your appointment.
You will be charged if you do not notify us.

Appendix E: Starting a Practice Resources

- [OMA Starting and Managing your Practice Resources](#)
- [OMA Learns](#) - Interactive learning modules and recorded webinars
- [OMA Advantages](#) - Exclusive offers and discounts
- [OMA Physician Health Program](#) - confidential support for mental health and substance abuse
- [OMA Insurance](#)



- [HealthForceOntario \(HFO\) Transition to Practice](#)
- [Canadian Medical Association \(CMA\) Checklist of things to do before starting practice \(Family Medicine\)](#)
- [Canadian Medical Protective Association \(CMPA\): Good Practices Guide - Reducing medical-legal risk](#)
- [Canadian Medical Protective Association \(CMPA\) Practical Tips for physicians in the first 5 years](#)
- [College of Physicians and Surgeons of Ontario Policies](#)
- [MD Financial Transition to Practice Articles](#)
- [Public Health Ontario \(PHO\) Infection Prevention and Control](#)