



Opening a Practice Checklist

This guide is not an exhaustive compilation of everything you need to do to open a practice. But the following checklist should make for a good start on the tasks facing you. Keep track of whether you have taken or considered these steps in your planning.

Setting Up

- Select a start date to begin practice
- Select professional advisors
- Develop a business plan

Required Licenses

- Obtain necessary medical certifications and licenses
- Obtain government employer numbers and tax identification numbers
- Obtain a business license
- Obtain an OHIP billing number

Location & Space Planning

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

Staffing

- Determine staff positions
- Develop job descriptions
- Specify salary schedule
- Place advertisement for new staff
- Review resumés, interview candidates
- Obtain credentials, check reference and conduct background checks
- Create employment contracts
- Make job offers
- Prepare and send new employee employment acceptance letters
- Sign employment contracts
- Set up employee personnel files
- Hold an employee meeting to review office procedures
- Decide on employee benefit package
- Establish communication processes between you and your staff

Hospital Privileges

- Submit application for hospital privileges
- Evaluate and negotiate hospital privileges if needed

Financial Planning

- Negotiate financing, if needed
- Open business chequing account
- Purchase/lease credit/debit card machine if needed
- Decide on dates for billing/collection follow up

Computer – Hardware & Software

- Determine hardware and software requirements
- Select qualified medical software vendors
- Prepare request for proposal
- Coordinate software demo
- Evaluate proposals
- Negotiate purchase and service agreement (**EMR Agreements should be reviewed by a lawyer**)
- Coordinate installation
- Coordinate and finalize training and system implementation
- All systems in place

Telephone System

- Determine hardware needs
- Determine lines/features needed
- Obtain telephone number(s)
- Organize installation and checks on the lines
- Set-up telephone answering service
- All systems in place

Furniture & Equipment

- Review needs
- Prepare budget
- Order office furniture based on needs
- Order medical record filing system
- Obtain quotes/order photocopier, fax machine
- Obtain quotes/order transcript and examination room equipment
- Obtain quotes/order laboratory and clinical equipment
- Obtain quotes/order refrigerator, microwave, and lunch room furniture
- Obtain quotes/order other waiting room furniture

Forms & Supplies

- Draft new patient information form
- Order business cards, office stationery, and letterhead
- Order medical supplies
- Coordinate with pharmaceutical representatives

Advertising & Marketing

- Develop practice logo
- Draft office opening announcement
- Place order for newspaper advertisement
- Do other direct mailing or advertising (e.g. mail announcement cards)
- Coordinate letterhead/business card design, prescription pad design
- If specialist, contact and meet referring doctors

Operational issues

- Prepare office policy and procedures manual
- Train staff in business procedures prior to opening
- Set-up bank deposit guidelines
- Set-up daily/monthly financial reporting
- Set-up appointment scheduling guidelines
- Establish procedures for dealing with appointment delays
- Set-up billing and accounts receivables guidelines
- Set-up medical records system
- Set-up accounts payable procedures
- All accounting systems in place

Insurance

- Evaluate insurance needs
- Obtain 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 WSIB insurance
- Review life insurance for coverage adequacy – increase coverage if necessary
- Review and obtain disability coverage if necessary

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

Checklist sources:
www.mydocsonline.com
www.firstprofessionals.com