



Name of Entity

Task	Assigned to Whom	Status	Notes
Secure Accounting Support			
Naming			
Register PLLC			
Obtain EIN			
Execute Organizational Documents			
Obtain Domain			
Apply for Practice NPI			
Logo/Font/Branding/Website Design			
Vision for Patient Experience			
Vision for Staff Experience			
Secure Funding			
Lease			
Rental Ins for Space			
Clinic/Lab Decor			
Phone Number			
Phone System			
Marketing/Referral Connections			
Establish Hospital/ACO/Provider Group Relationships			
Credential with Payors			
Internal Office Systems Used (Email, etc.)			
Establish Fee Schedule -Payor -Self Pay/Cash -Uninsured			
Provider Schedule Build			
Provider Template			
Business Liability Ins.			
Malpractice Ins.			



Practice Management System			
Worker's Comp Ins.			
Payroll			
Office Equipment			
Staffing			
Patient Consents			
Other Intake Forms			
Scheduling Patients			
Clinic Equipment			
Clinic Finishes			
CLIA Certification			
Employee Handbook			
Treating patients			
Billing payors and patients			
Receiving payments from payors and patients			
After Hours Phone Calls			
PACS			
Public Opening			
Policies and Procedures			