



Starting a New Medical Practice Checklist

Preparing the Practice

- Determine business model and entity
- Open a practice checking account
- Get a tax/employer identification number (TIN or EIN)

Organization Operations

- Secure malpractice insurance
- Set up a fee schedule
- Get your credentials

Buying Software and Supplies

- Choose an electronic health records system
- Decide between billing software or outsourced services
- Obtain medical equipment and tools

Defining Staff Workflow

- Delineate employee roles
- Set up personnel benefits
- Perform security risk assessment

Promoting Your Practice

- Network with colleagues
- Develop an online presence to attract new patients
- Participate in community outreach activities