



The following document was created for one of our clients. The document is meant to be a step-by-step “To Do List” to start a practice. It is based on the needs of an Arizona-based practice. The links provided will need to be verified and modified to make it applicable for a practice in a different locality.

Every effort was made to think of all possibilities. If you find one I’ve missed, please let me know.

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## Goals

Decide on corporate goals and convey these to your accountant/attorney/manager  
Build long-term equity/  
Provide owner/members/shareholders quick or steady cash flow?  
Build retirement income?

Open practice by \_\_\_\_\_ what date?

## Define and implement the new business

Which structure is most advantageous to use?

Get your accountant and attorney to advise you as to which structure best suits your needs

C-corp

S-corp

LLC

Partnership

Sole proprietor (no protection)

Once the structure is decided, you will need to apply for an EIN number from the IRS

Your accountant/attorney should do this for you

Get a copy of the letter from the IRS acknowledging the EIN

Keep this letter available. You will need multiple copies of this letter for credentialing and for setting up bank accounts.

Register your new company with the Arizona Corporation Commission

<http://www.azcc.gov/>

## Staffing

Now may be the time to hire a practice manager

The manager can assist with all the “leg-work” that follows

Hire office/nursing staff or make arrangements to do so at a time closer to practice’s opening.

## Banking

Set up bank account(s)

Line of credit?

Your accountant/attorney will assist you.

## FACILITY

Interior designer?

Waiting room furniture

Chart filing system

Medical equipment

Exam tables

Medical supplies

Drugs

Desks/chairs

Office equipment

## NPI

Enroll the new company with a new organizational NPI

<https://npiregistry.cms.hhs.gov/NPPESRegistry/NPIRegistryHome.do>

Update your individual NPI to reflect your current address, phone, etc. (Same website as above)

Keep the usernames and passwords in a handy but secure place.

## CLIA registration

If ANY laboratory procedures are to be done in the office you will need to apply for a CLIA number.

<https://www.cms.gov/Medicare/CMS-Forms/CMS-Forms/downloads/cms116.pdf>

## DEA - change info for your DEA enrollment

AZ Medical Board - update info

<http://azmd.gov/>

OSHA

Credentialing

Get a copy of each provider's CV (curriculum vitae); this will routinely be asked for by hospitals and insurance companies during credentialing.

PECOS enrollment

<https://pecos.cms.hhs.gov/pecos/login.do>

This will initiate the enrollment process with Medicare. Without a completed PECOS enrollment you will NOT be able to bill Medicare patients. It will also be required to enroll in Medicare Advantage plans.

Railroad Medicare needs separate credentialing

<http://www.palmettogba.com/palmetto/providers.nsf/docsCat/Railroad%20Medicare~Resources~Provider%20>

Enrollment

CAQH

This is a central credentialing site. Most of the bigger "players" (insurance carriers) use this site to start your credentialing (i.e., Aetna, UHC, etc.) and saves a lot of time over credentialing individually.

<http://www.caqh.org/>

Possibly utilize an outside credentialing service?

<http://hpssolutions.com/>

AHCCCS

<http://www.azahcccs.gov/commercial/ProviderRegistration/registration.aspx>

Hospitals

Use a local physician friend to guide you

EDI (Electronic Data Interchange, aka electronic claims) ENROLLMENT

Some carriers require you to go thru THEIR clearinghouse. Make sure to enroll with their clearinghouse or make sure that your main clearinghouse submits to their clearinghouse

Electronic claims clearinghouse

[www.navicare.com](http://www.navicare.com)

Payroll

If you are managing your own payroll, you will probably need a separate bank account for withholding.

Optionally, you can "hire out" the payroll and employee benefits to a 3<sup>rd</sup> party.

I have used Consolidate Personnel Services successfully for over 15 years.

<http://www.cpspeo.com/>

Contracts

There are many contracts that may need creation (or "changed over" in case this is a buyout)

Some examples:

LEASE	Work Comp Insurance	Postage meter
Copier lease/maintenance	Computer maintenance	Sharps removal/disposal
Network maintenance	Software maintenance	Records storage/archival
fire extinguisher	uniform/laundry	phone system maintenance

Document destruction	advertising	yellow pages
SEO	Website & domain name	Alarm system/monitoring

## Services

Transcription <http://acsmb.com/acsmb/transcription/>

Billing <http://acsmedicalbilling.com/>

Billing service vs. in-house billing

Website design <http://acsazp.com/>

EMR?

<http://www.eclinicalworks.com/>

<http://www.practicesuite.com/>

Collection agency

<http://www.jrbfinancial.com/>

## MISC

Logo?

Desks/office supplies

Coding books

CPT

ICD-10CM

HCPCS

[www.gotnpi.com](http://www.gotnpi.com) for NPI lookup and ICD-10 lookup

Order new forms

letterhead

Envelopes

superbills

business cards

prescription pads

financial policy

HIPAA Notice of Privacy Policies brochures

new patient forms

CMS-1500 (insurance) forms

Signage

Name tags

HIPAA

Assign a Privacy Officer

Assign a Security Officer

Compliance

Assign a Compliance Officer

OSHA?

Design a compliance manual

Trade associations

Chamber of Commerce

Schedule an Open house

Publish announcement of new company

Extract mailing lists from [www.gotnpi.com](http://www.gotnpi.com) or purchase mailing lists from list broker

Misc licenses

State/county/municipal licenses required?

State/county/municipal tax reporting and payment?