

Practice Startup Checklist



WEEK START DATE 12/30/2029

	TASK DESCRIPTION	Who's Responsible	Completed?	STATUS	NOTES
PRO FORMA	1-3 Year Vision	Owner/HMR	<input type="checkbox"/>	Not Started	
	# Providers and Support Staff	Owner/HMR	<input type="checkbox"/>	Not Started	
	Space Needs	Owner/HMR	<input type="checkbox"/>	Not Started	
	Equipment Needs	Owner/HMR	<input type="checkbox"/>	Not Started	
	Other	Owner/HMR	<input type="checkbox"/>	Not Started	
INCORPORATION	Corporate Name	\$ Attorney	<input type="checkbox"/>	Not Started	
	Articles of Incorporation	\$ Attorney	<input type="checkbox"/>	Not Started	
	Application for Federal and State ID #s	\$ Attorney	<input type="checkbox"/>	Not Started	
	Professional Firm Registration- Board of Practice	HMR	<input type="checkbox"/>	Not Started	
	Corporate By Laws	\$ Attorney	<input type="checkbox"/>	Not Started	
	Stock/Shareholder Agreements	\$ Attorney	<input type="checkbox"/>	Not Started	
	MMB Swift Vendor Number and Location Code	HMR	<input type="checkbox"/>	Not Started	
	Type 1 and 2 NPI	HMR	<input type="checkbox"/>	Not Started	
	Register website domain/Website	Owner/Vendor	<input type="checkbox"/>	Not Started	
	Business and Professional Liability Insurance	\$ Broker	<input type="checkbox"/>	Not Started	
	Business Interruption Insurance	\$ Broker	<input type="checkbox"/>	Not Started	
	Worker's Comp Insurance	\$ Broker	<input type="checkbox"/>	Not Started	
	Secure Office Space	\$ Landlord	<input type="checkbox"/>	Not Started	
	Electronic Medical Record	\$ Vendor	<input type="checkbox"/>	Not Started	
	Revenue Cycle Management	\$ Vendor	<input type="checkbox"/>	Not Started	
	Establish Bank Accounts/LOC/Financing	Owner/HMR	<input type="checkbox"/>	Not Started	
	Payroll Service	\$ Vendor/HMR	<input type="checkbox"/>	Not Started	
	Benefits (if needed)	\$ Vendor	<input type="checkbox"/>	Not Started	
	Bookkeeping	\$ Vendor/HMR	<input type="checkbox"/>	Not Started	
CONTRACTING & CREDENTIALING	MCC Account for each provider	Owner/HMR	<input type="checkbox"/>	Not Started	
	CAQH Account for each provider	Owner/HMR	<input type="checkbox"/>	Not Started	
	NPES/PECOS Account for Clinic	Owner/HMR	<input type="checkbox"/>	Not Started	
	Specify Clinic Specialty	Owner/HMR	<input type="checkbox"/>	Not Started	
	Identify and Apply to Networks	Owner/HMR	<input type="checkbox"/>	Not Started	
	Gather Clinic and Provider Data	Owner/HMR	<input type="checkbox"/>	Not Started	
	Cultural Competency Training	Owner/HMR	<input type="checkbox"/>	Not Started	
	Disclosure of Ownership	Owner/HMR	<input type="checkbox"/>	Not Started	
MARKETING	Medicare PTAN	Owner/HMR	<input type="checkbox"/>	Not Started	
	Website Development	\$ Vendor	<input type="checkbox"/>	Not Started	
	SEO Management	\$ Vendor	<input type="checkbox"/>	Not Started	
PHYSICAL RESOURCES	Develop the Story	Owner/HMR	<input type="checkbox"/>	Not Started	
	Office Equipment	\$ Vendor	<input type="checkbox"/>	Not Started	
	Phone System	\$ Vendor	<input type="checkbox"/>	Not Started	
	Lab Equipment & Support (if applicable)	\$ Vendor	<input type="checkbox"/>	Not Started	
	Office Furniture	\$ Vendor	<input type="checkbox"/>	Not Started	
	IT Equipment & Support	\$ Vendor	<input type="checkbox"/>	Not Started	