Private Practice Startup Checklist

This checklist is designed to guide you through the essential steps to establish your practice smoothly. Please review and complete each item as you progress.

Step	Description	Completed
1. Define Your Practice		
Practitioner Name		☐
Practice Specialty		☐
Target Patient Population	Determine the demographic you'll serve.	☐
Practice Name	Choose a name for your practice.	☐
Legal Structure	Decide on the legal structure (e.g., sole proprietorship, LLC).	☐
2. Business Planning		
Create a Business Plan	Develop a comprehensive business plan outlining goals and strategies.	☐
Financial Planning	Determine startup costs, revenue projections, and funding sources.	☐
3. Licensing and Permits		
Obtain Professional License	Apply for and obtain necessary licenses for your practice area.	☐
Business Permits	Obtain any required local business permits.	☐
Registration	If applicable, register with the appropriate government agency.	☐

4. Location and Facility

Choose Practice Location	Select a suitable location for your practice.	☐
Lease or Purchase Property	Secure a lease or purchase agreement for your practice space.	☐
Facility Setup	Set up your practice space with necessary equipment and amenities.	☐

5. Staffing and HR

Hire Staff	Recruit and hire administrative and clinical staff as needed.	☐
Employment Contracts	Draft employment contracts outlining roles, responsibilities, and terms.	☐
HR Policies	Develop HR policies covering employee conduct, benefits, and leave.	☐

6. Technology and Systems

Electronic Health Records (EHR)	Select and implement an EHR system for managing patient records.	☐
Practice Management Software	Choose software for scheduling, billing, and administrative tasks.	☐
Telemedicine Setup	Explore options for offering telemedicine services to patients.	☐

7. Marketing and Branding

Brand Identity	Develop a logo, brand colors, and visual assets for your practice.	☐
Marketing Strategy	Create a marketing plan to attract patients, including online presence.	☐

Patient Education Materials	Design informative materials to educate patients about your services.	☐

8. Insurance and Billing

Credentialing with Insurers	Complete insurance credentialing to accept various health plans.	☐
Fee Structure	Establish fee schedules for services and communicate them clearly to patients.	☐
Billing and Coding	Implement billing and coding practices compliant with healthcare regulations.	☐

9. Compliance and Regulations

HIPAA Compliance	Ensure compliance with HIPAA regulations for patient privacy and data security.	☐
Other Requirements	Adhere to other requirements like the Occupational Safety and Health Administration guidelines for safety.	☐
State and Federal Regulations	Stay updated on healthcare laws and regulations governing your practice.	☐