PHYSICIAN & TMS CLINIC

New Clinic Start-Up Checklist



There is a lot to think about when you choose to start your own medical practice. Use this checklist to help make sure you've covered all the right bases.

Office Selection & Setup

- □ Location Selection
 - Consider space needed for TMS system and private consultations
- □ Sign Building Lease (review with attorney)
- □ Space/Build Out
 - Obtain Permit if applicable
- □ Obtain Certificate of Occupancy
 - Fire Inspection
 - Safety Inspection
 - City Inspections
- □ Purchase Furnishings/Supplies
- □ Set Office Hours
- □ Determine Name & Purchase Signage
 - Private Practice Name, TMS Clinic
 Name
- □ Acquire Tax ID, NPI, DEA, & State Controlled Substance (if applicable) Numbers
- \Box Obtain Bank Account(s)
- □ Get Credentialed with Provider Networks
- □ Obtain Sales Tax Certificate (depending on state requirements)
- □ Determine Office Overhead
- □ Accounting Firm/Software Selection
- □ Survey of Insurance Fees
- □ Develop Fee-for-Service Schedule
- □ Establish Patient Financial Policy

Administrative Setup

- Determine Legal Structure (discuss with attorney or accountant)
- Obtain Business License(s)
- □ Insurance:
 - Office Liability
 - Employee Fidelity Bond
 - Umbrella Policy
 - Workers Compensation
 - Health/Disability/Life if applicable
 - Malpractice (rates vary by location)
- □ Policies/Procedures/Protocols Manual(s)
- Develop Employee Orientation Manual
- □ Hospital Privileges if applicable
- Determine Covering Physician

Business Planning

- □ Formulate Business Plan
- □ Marketing Plan
- □ Financial Plan/Budget
- □ Strategic Plan/Goal Setting

TMS Clinic Planning

- □ Obtain TMS Certification
- □ Determine if Separate EIN
- □ Make TMS System Selection
- Consult with TMS Experts for Billing, Prior Authorization, Fee Schedule, and Credentialing Services

Implementations/Inspections/Training

- □ OSHA Training
- □ Stark Law Training
- □ CLIA Training if applicable
- □ HIPAA Training
- □ Emergent Procedure Training
- Obtain & Post Required Posters
 (i.e., OSHA, Equal Pay, etc.)

Equipment & Technology

- □ Determine Method of Bookkeeping
- □ Electronic Health Records (EHR)
- □ Phone System
- □ Hardware
- □ Internet

Notes

Vendors

- Document Destruction
- □ Laboratory if applicable
- Credit Cards Processing
- □ Office Supplies
- □ TMS Consulting
- □ TMS Billing Services
- TMS Support Services (prior authorizations, documentation, policies, procedures, training, job descriptions, etc.
- □ Payroll Service / Provider

Staffing

- □ Job Descriptions
- □ Hire/Train Staff
- □ Employee Handbook (policies/requirements)
- □ Insurance Coverage