

How to Start a Medical Practice in Texas [CHECKLIST]

1. ADMINISTRATION & PREPARATION

- ☐ Determine the business model and tax structure
 - ☐ Establish a company agreement
 - ☐ Develop policies & procedures
 - ☐ Obtain a Group National Provider Identifier (NPI)
 - ☐ Obtain Tax/Employer Identification Number (EIN)
 - ☐ Register with Texas Health Maintenance Organizations/PPOs and Government Payers
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2. OFFICE & FACILITIES

- ☐ Medical practice location selection
 - ☐ Office lease
 - ☐ Real estate lawyer
 - ☐ Furnishings
 - ☐ Reception
 - ☐ Exam rooms
 - ☐ Back office
 - ☐ Certificate of occupancy
 - ☐ Fire inspection
 - ☐ Safety inspection
 - ☐ City inspections
 - ☐ Signage
 - ☐ Optional: landscaping
 - ☐ Optional: interior decorator
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3. EQUIPMENT & SUPPLIES

- ☐ Filing cabinets and storage
 - ☐ Exam room equipment & supplies
 - ☐ Petty cash box and book
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4. VENDORS & SUPPLIERS

- ☐ Contracts for lab, x-ray, MRI, or other if needed
 - ☐ Medical waste management and disposal if necessary
 - ☐ Document destruction
 - ☐ Janitorial & maintenance
 - ☐ Practice management services and/or medical billing and credentialing service
 - ☐ Accounting firm
 - ☐ Law firm
 - ☐ HR management
 - ☐ Staffing firm
 - ☐ Marketing services
 - ☐ Collection agency
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5. TECHNOLOGY

- ☐ Internet access
- ☐ Wi-Fi
 - ☐ Guest wifi for patients
 - ☐ Main wifi for personnel
- ☐ Copier with scanning
- ☐ Dictating equipment if necessary
- ☐ Phone system
- ☐ Answering service
- ☐ Cell phones w/ HIPAA compliance
- ☐ Intercom
- ☐ Fax machine

- ☐ Medical office computer system
 - ☐ Hardware
 - ☐ Software
 - ☐ Connectivity
 - ☐ EHR
 - ☐ Digital forms
 - ☐ Patient portal
 - ☐ Practice management system
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6. FINANCIAL & BILLING

- ☐ Determine setup costs & expenses
 - ☐ Calculate overhead
 - ☐ Develop a standard document for loan and cash flow projections
 - ☐ Billing software vs. outsourced services
 - ☐ Establish patient financial policy
 - ☐ Banking
 - ☐ Financing
 - ☐ Set up a business checking account
 - ☐ Merchant services/credit card processing
 - ☐ Deposit stamp for checks
 - ☐ Electronic draft transfer
 - ☐ Establish fee schedule
 - ☐ CMS 1500 claim forms
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7. CODING & DOCUMENTATION

- ☐ CPT, ICD-10, HCPCS coding books
- ☐ Forms
 - ☐ Prescription forms
 - ☐ New patient registration
 - ☐ Patient medical history
 - ☐ Return to work/school
- ☐ Charge ticket
- ☐ Release of medical records
- ☐ Progress of medication notice
- ☐ Hospital rounds records

8. INSURANCE

- ☐ Visit the [Texas Department of Insurance](#) for applications and information
 - ☐ Malpractice insurance
 - ☐ Business insurance
 - ☐ Medical liability
 - ☐ Disability insurance
 - ☐ Health insurance
 - ☐ Life insurance
 - ☐ Employee fidelity bond
 - ☐ Umbrella policy
 - ☐ Workers compensation
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9. HR & STAFFING

- ☐ Identify roles & job descriptions
- ☐ Choose personnel sourcing methods
- ☐ Review DFW medical office salaries data
- ☐ Personnel benefits plan
- ☐ Training for office personnel
 - ☐ Policies & procedures
 - ☐ HIPAA
 - ☐ OSHA
 - ☐ Stark
 - ☐ CLIA
 - ☐ Universal Protocol Training
 - ☐ Disaster response
- ☐ Personnel manual
- ☐ Payroll software/service
- ☐ Personnel management plan

10. HIPAA

- ☐ Create a guide to compliance & non-compliance
 - ☐ List personnel rules & guidelines
 - ☐ Outline violation response plan
 - ☐ Designate a HIPAA privacy & compliance officer
 - ☐ Perform security risk assessment
 - ☐ Overview of all protected health info (PHI) you create, receive, or transmit
 - ☐ List of all physical/digital locations where PHI is stored/maintained
 - ☐ Assessment of current security measures in practice
 - ☐ Rundown of possible threats and vulnerabilities to PHI
 - ☐ Evaluation of each threat's likelihood
 - ☐ Determination of the impact of potential threats
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11. BUSINESS DEVELOPMENT

- ☐ Announce practice opening
 - ☐ To colleagues
 - ☐ In local newspaper/other local media
 - ☐ Open house for referring physicians
- ☐ Join Chamber of Commerce & local business organizations
- ☐ Apply to get put on DFW & TX physician directories
- ☐ Website design, development, & maintenance
- ☐ Create Brand
 - ☐ Finalize business name
 - ☐ Create brand identity
 - ☐ Finalize logo design
 - ☐ Order branded practice materials
 - ☐ Brochure/pamphlets
 - ☐ Business cards
 - ☐ Announcements
 - ☐ Stationery

- ☐ Create practice newsletter
- ☐ Community outreach
- ☐ Online Reputation Management (ORM)
- ☐ Identify practice referral services
 - ☐ DFW medical societies
 - ☐ Hospital
 - ☐ HMO/PPO/IPA, ACO participation
 - ☐ Medicare participation/non-participation decision
- ☐ Find contacts with social service agencies & others for referrals
- ☐ Identify potential referring physician contacts
- ☐ Apply for memberships as desired
 - ☐ DCMS and branch societies
 - ☐ County specialty society
 - ☐ Civic and church orgs
 - ☐ [DCMSAF](#)

Need assistance starting your Texas medical practice?

We can help you get set up, as well as assist with administration, billing, credentialing, human resources and other practice operations - whether you are thinking of starting a new practice, adding a location, or looking for management support for your existing practice.

[Contact us here for more information.](#)