

# How to Start a Medical Practice in Texas [CHECKLIST]

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## 1. Administration & Preparation

- Determine business model
  - Review Dallas County Medical Society [Best Practices](#)
  - Review Texas Medical Jurisprudence Manual/Study Guide
  - Develop Policies & Procedures
  - Obtain 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

- Site 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
  - Clipboards for reception desk
  - Magazines for reception
  - Exam room equipment & supplies
  - Petty cash box and book
  - Medical reference journals and newsletters
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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
  - Accounting firm
  - Law firm
  - HR management
  - Staffing firm
  - Marketing services
  - Collection service
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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
    - Checking
    - Business
    - Personal
    - 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
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## 10. HIPAA

- Create 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 at practice
    - Rundown of possible threats and vulnerabilities to PHI
    - Evaluation of each threat's likelihood
    - Determination of 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 development & maintenance
- Order branded practice materials
  - Brochure/pamphlets
  - Business cards
  - Announcements
  - Stationery
- Create practice newsletter
- Community outreach
- Develop online presence
- Identify practice referral services
  - DFW medical society
  - Hospital
  - HMO/PPO/IPA, ACO participation
  - Medicare participation/non-participation decision
- Find contacts with social service agencies & other for referral
- Identify potential referring physician contacts
- Apply for memberships as desired
  - DCMS and branch societies
  - County specialty society
  - Civic and church organizations
  - [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.](#)