

## Opening a Practice Checklist

Opening a new practice is an exciting prospect but working through the steps to make it a reality can feel overwhelming. To help you keep track of the needs and requirements of opening a practice, the following checklist outlines some important actions you can take to start the process.

Although this is not an exhaustive list, the Opening a Practice Checklist can help you start thinking about different aspects of your business. Each clinic will have specific needs that will vary depending on individual factors, and this list is meant to be used as a general guideline only.

The following list is compiled from Business Pathways and Doctors of BC resources.

### BUSINESS CONSIDERATIONS:

	Develop a business plan using <a href="#">ScotiaAdvice+ Business Plan Writer</a>
	Select financial and legal professionals*
	Determine clinic organizational structure and values

### REGISTRATION REQUIREMENTS:

	Register with the <a href="#">College of Physicians and Surgeons of BC</a>
	Obtain billing number from <a href="#">Medical Services Plan (MSP)</a>
	Acquire <a href="#">privileges</a> with the Health Authority, if applicable
	Register with the <a href="#">BC Business Registry</a>
	Apply for a Municipal/City <a href="#">Business License</a>
	Set up <a href="#">CRA Business Registration</a>
	Register with <a href="#">WorkSafeBC</a>
	<a href="#">Apply for MSP Facility Number</a>

\*Professional business services with preferred rates through [Club MD](#)

## LOCATION PLANNING:

	Determine space requirements
	Contact <a href="#">commercial real estate or leasing professional</a>

## STAFFING:

[Business Pathways HR Toolkit](#) provides simple instructions and helpful templates to ensure you have what you need to manage staffing matters at every stage of the process.

	<a href="#">Assess</a> staffing needs
	Develop <a href="#">job descriptions</a>
	Compare <a href="#">salary ranges</a>
	Advertise required position(s)
	<a href="#">Interview</a> and <a href="#">rate</a> candidates
	Offer <a href="#">employment contract</a>
	Complete <a href="#">new employee documentation</a>
	Set up <a href="#">payroll</a>
	Establish <a href="#">office policies</a>
	Determine workflow processes



## FINANCIAL PLANNING:

	Discuss financing options, if applicable
	Open a business banking account
	Set up payment method (credit/debit machine), if needed
	Develop system for tracking expenses (establish the bookkeeping process)

## TECHNOLOGY:

	Set up phone and internet (See member rates with <a href="#">TELUS</a> )
	Review the <a href="#">essential technology</a> for Doctors in BC
	Evaluate EMR options
	Develop <a href="#">privacy and security</a> measures with resources from DTO
	Establish <a href="#">virtual care</a> system, if applicable
	Review the <a href="#">IT Best Practices Checklist for Clinics</a>

## FURNITURE AND EQUIPMENT:

	Assess needs based on business plan and space
	Review budget and obtain quotes to compare pricing
	Look for opportunities to save by bundling purchases if possible
	Check for discounted rates available through <a href="#">Club MD</a> (Dell Canada, Chairlines, Staples Canada)

SUPPLIES:

	Consider required supplies for various office functions
	Order supplies*
	Document and track costs when supplies are reordered

INSURANCE:

	Contact <a href="#">Doctors of BC Insurance</a> to discuss personal and commercial coverage
	Review commercial insurance requirements for medical clinics

OTHER:

	Set up utilities
	Develop <a href="#">emergency preparedness plan</a> **
	Arrange for janitorial services
	Implement a <a href="#">patient code of conduct/policy</a>
	Evaluate benefits of incorporation (See information from <a href="#">MD Financial</a> )
	Apply for <a href="#">CMPA membership</a>
	Contact <a href="#">Doctors of BC</a> to discuss and understand <a href="#">negotiated benefits</a>

\* Preferred rates available for office supplies at Staples and Mills through Club MD

\*\* Include a personal Will and plan for medical records in case of emergencies/unexpected absence.