Opening a new practice can feel exciting and 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 Doctors of BC and Business Supports resources.

BUSINESS CONSIDERATIONS:

|  |  |
| --- | --- |
| Business Considerations and Financial Planning: | |
|  | Develop a business plan using the [Business Planning Toolkit](https://www.doctorsofbc.ca/advice-support/business-support/managing-your-office/business-planning-toolkit) |
|  | Select financial and legal professionals\* |
|  | Determine clinic organizational structure and values |
|  | 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) |

REGISTRATION REQUIREMENTS:

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| Registration Requirements: | |
|  | Register with the [College of Physicians and Surgeons of BC](https://www.cpsbc.ca/registrants/current-registrants/registration-and-licensing) |
|  | Obtain billing number from [Medical Services Plan (MSP)](https://www2.gov.bc.ca/gov/content/health/practitioner-professional-resources/msp/physicians/enrolment) |
|  | Acquire [privileges](https://www.cpsbc.ca/accredited-facilities/nhmsfap/credentialing) with the Health Authority, if applicable |
|  | Register with the [BC Business Registry](https://www.account.bcregistry.gov.bc.ca/decide-business) |
|  | Apply for a Municipal/City [Business License](https://www2.gov.bc.ca/gov/content/employment-business/business/managing-a-business/starting-a-business/starting-a-restaurant-in-bc/permits-licences/municipal-permits-licences) |
|  | Set up [CRA Business Registration](https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/registering-your-business/register.html) |
|  | Register with [WorkSafeBC](https://www.doctorsofbc.ca/advice-support/business-support/managing-your-office/workplace-requirements-information) |
|  | [Apply for MSP Facility Number](https://www2.gov.bc.ca/assets/gov/health/forms/2948fil.pdf) |
|  | Apply for [CMPA membership](https://www.cmpa-acpm.ca/en/become-a-member/how-to-apply) |

LOCATION PLANNING:

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| Location Planning: | |
|  | Determine space requirements |
|  | Contact [commercial real estate or leasing professional](https://www.bcfsa.ca/public-resources) |

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AFFING:

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| Staffing: | |
| [Business Supports HR Toolkit](https://www.doctorsofbc.ca/advice-support/business-support/managing-your-office/human-resources-toolkit) provides simple instructions and helpful templates  to ensure you have what you need to manage staffing matters at every stage of the  process. | |
|  | [Assess](https://www.doctorsofbc.ca/sites/default/files/bp_assessingstaffingneeds.pdf) staffing needs |
|  | Develop job descriptions |
|  | Compare [salary ranges](https://www.jobbank.gc.ca/trend-analysis/search-wages) |
|  | Advertise required position(s) |
|  | [Interview and rate](https://www.doctorsofbc.ca/sites/default/files/documents/interview-rating-form-and-sample-questions.docx) candidates |
|  | Offer [employment contract](https://www.doctorsofbc.ca/sites/default/files/bp_sampleemployeeagreement.docx) |
|  | Complete [new employee documentation](https://www.doctorsofbc.ca/sites/default/files/bp_employeefilechecklistguidelines.docx) |
|  | Set up [payroll](https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/payroll.html) |
|  | Establish [office policies](https://www.doctorsofbc.ca/sites/default/files/bp_sampleofficepolicies.docx?m) |
|  | Determine workflow processes |

FINANCIAL PLANNING:LOGY:

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| --- | --- |
| Technology: | |
|  | Set up phone and internet (See member rates with [TELUS](https://www.doctorsofbc.ca/insurance-benefits/member-exclusive-programs/telecommunications)) |
|  | Review the [essential technology](https://www.doctorsofbc.ca/sites/default/files/documents/business-supports-essentialtechnology.pdf) for Doctors in BC |
|  | Evaluate EMR options |
|  | Develop [privacy and security](https://www.doctorsofbc.ca/advice-support/doctors-technology-office/enhance-your-clinics-security) measures with resources from DTO |
|  | Establish [virtual care](https://www.doctorsofbc.ca/advice-support/doctors-technology-office/virtual-care) system, if applicable |
|  | Review the [IT Best Practices Checklist for Clinics](https://www.doctorsofbc.ca/sites/default/files/dto-checklist_it_best_practices_for_clinics.pdf) |
|  | Review and set up access to [PharmaNet for Practitioners](https://www2.gov.bc.ca/gov/content/health/practitioner-professional-resources/pharmacare/pharmanet-bc-s-drug-information-network) |

FURNITURE AND EQUIPMENT:

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| 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 [Club MD](https://www.doctorsofbc.ca/insurance-benefits/member-exclusive-programs/clubmd) |

PLIES:

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| Supplies: | |
|  | Consider required supplies for various office functions |
|  | Order supplies |
|  | Document and track costs when supplies are reordered |

INSURANCE:

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| Insurance: | |
|  | Contact [Doctors of BC Insurance](https://www.doctorsofbc.ca/insurance-benefits/insurance) to discuss personal and commercial coverage |
|  | Review commercial insurance requirements for medical clinics |

OTHER:

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| Other: | |
|  | Set up utilities |
|  | Develop [emergency preparedness plan](https://www.doctorsofbc.ca/advice-support/business-support/managing-your-office/contingency-planning)\*\* |
|  | Arrange for janitorial services |
|  | Implement a [patient code of conduct/policy](https://www.doctorsofbc.ca/sites/default/files/documents/bp-patient-code-of-conduct.docx) |
|  | Evaluate benefits of [incorporation](https://www.cpsbc.ca/registrants/current-registrants/pmc) (See information from [MD Financial](https://invested.mdm.ca/how-does-medical-practice-incorporation-work/)) |
|  | Contact [Doctors of BC](https://www.doctorsofbc.ca/contact) to discuss and understand [negotiated benefits](https://www.doctorsofbc.ca/insurance-benefits/negotiated-benefits) |
|  | Consider [agreement contracts for group practices](https://www.doctorsofbc.ca/advice-support/business-support/managing-your-office/agreement-templates) (Group Governance, Cost Sharing, Release of Information, Data Sharing, Contractor) |