

# NEW MEDICAL OFFICE CHECKLIST

Starting a new medical practice can seem overwhelming. Even relocating or joining an established practice can prove daunting. Beyond purchasing equipment, leasing office facilities, and hiring staff, a myriad of federal, state, and local laws and regulations must be considered. To help facilitate these endeavors, FPIC has compiled the following checklist:

## Required Licenses

Yes

No

- Drug Enforcement Administration (DEA)
- State Medical License(s)
- Business License
- CME Requirements

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## State Employer Numbers

Federal Employer Numbers and Tax Information

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## Workers' Compensation Insurance

- Occupational Safety and Health Administration (OSHA)
- Clinical Laboratory Improvement Amendment (CLIA)

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## Insurance

- Personal (A&H, Life, Auto)
- Casualty and Liability (Premises)
- Professional Liability Coverage (Medical Malpractice)
- Multi-peril

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## Credentialing Process

Managed Care (HMO, PPO, MCO), Provider Plans, Contracts and Agreements

- Medical Provider Number(s)
- Medicaid Provider Number(s)

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## Answering Service

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## Fee Schedule and Coding/Billing

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## Collection Agency

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## Hospital Privileges

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## Advertisement and Marketing

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# NEW MEDICAL OFFICE CHECKLIST (CONTINUED)

Yes No

## Americans with Disability Act (ADA)

- Interpreter Services

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## Staffing

- Credentials Needed for Support Staff
- Reference and Background
- MCO Requirements

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## Risk Management Plan

- Policy and Procedure
- Reference Material

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## Sample Medical Forms

- Patient Information Forms
- H & P Forms
- History Forms
- Consent Forms
- Medication Log
- Charts and Graphs

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## Emergency Equipment

- Resuscitation Kit
- Oxygen Tank
- Ambu Bag
- CPR Training for Physician & Staff

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## Biohazard Plan

- Crash Cart
- Fire Extinguisher
- Security and Alarm System

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## Society Memberships

- American Medical Association
- State Medical Society
- County Medical Association
- Specialty Society

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# NEW MEDICAL OFFICE CHECKLIST (CONTINUED)

	Yes	No
<b><u>Computer Medical Software</u></b>		
• Electronic Communications Systems	_____	_____
• Integrity Controls	_____	_____
• Back-up System/Plan	_____	_____
<b><u>Laboratory Equipment</u></b>		
• Service Records and Agreements	_____	_____
• Manufacturers Warranties	_____	_____
• Instruction Manuals	_____	_____
<b><u>Medical Record</u></b>		
• Filing System	_____	_____
• Chart/Folders Supplies	_____	_____
• Storage Area/Cabinets	_____	_____
• Organization of Chart Controls	_____	_____
• Electronic Formats	_____	_____
<b><u>Posted Notices</u></b>		
• Designated Areas for Mandatory Posting Requirements	_____	_____
• Printed Signs and Charts	_____	_____
<b><u>Waste Disposal</u></b>		
• Contracts and Service Agreement	_____	_____

## **BUSINESS SUPPLIES & EQUIPMENT**

- Desk and Chairs
- Name Tags and Signs
- Side Chairs
- Wastebaskets
- Filing – Shelves/Cabinets
- Telephone Equipment
- Computer Equipment
- Fax Machine
- Printers
- Photocopier
- Dictation Transcription Equipment
- Answering Machine/Service

## **BUSINESS SUPPLIES & EQUIPMENT (CON'T)**

- Bookkeeping Equipment
- Fireproof Storage Cabinet
- Secretarial/Clerical Supplies

## **REFERENCE MATERIAL**

- Phone Book and Directories
- Manuals
- Instructions
- Medical Tests and Reference
- PDR

# NEW MEDICAL OFFICE CHECKLIST (CONTINUED)

## REFERENCE MATERIAL (CONT.)

- Medical Dictionary
  - Service Manuals
  - CD-ROMS
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## LABORATORY EQUIPMENT

- Microscope
  - Centrifuge (hematocrit/urine)
  - Hematocrit Capillary Tubes, Sealer
  - WBC Chambers/Pipettes
  - Sedimentation Set
  - Incubator
  - Urinometer/Dipsticks
  - Test Tubes and Racks
  - Microscope Slides/Cover Slips
  - Gram-stain Reagents
  - 10% KOH
  - Saline
  - Refrigerator
  - Wax Pencils
  - Urine Culture Sets
  - Laboratory Timer
  - Blood Drawing Equipment
  - Strep Screen Kit
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## INSTRUMENTS

- Sterilizers
- Sphygmomanometers
- Stethoscope
- Otoscope
- Ophthalmoscope
- Flashlight
- Tongue Blades
- Reflex Hammer
- Tuning Forks
- Cerumen Remover
- Syringe

## INSTRUMENTS (CONT.)

- Suction Set
  - Surgical Instruments
  - Electrocardiogram
  - Thermometers
  - Cotton-tipped Applicators
  - Emesis Basin
  - Glucometer
  - Storage Jars/Containers
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## EXAMINATION ROOM

- Examination Table and Stool
  - Waiting Chairs
  - Wall Cabinet
  - Physician's Lamp
  - Clothes Rack or Hangers
  - Mirror
  - Screen or Curtains
  - Scale
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## STATIONERY

- Printed Letterhead Paper & Envelopes
  - Mailing Supplies/Postage Meter
  - Note Pads
  - Sign-In Sheets
  - Message Pads
  - Billing Invoices & Statements
  - Prescription Pads
  - Business Cards
  - Laboratory Slips
  - Appointments Calendar
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## RECEPTION AREA

- Tables and Lamps
- Decorative Items
- Television/VCR/Music/Intercom System
- Artwork/Mirrors

# NEW MEDICAL OFFICE CHECKLIST (CONTINUED)

## RECEPTION AREA (CONT.)

- Medical Literature Rack
  - Magazines and Books
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## FORMS

- Preprinted Forms
  - Instruction Sheets
  - Consent Forms
  - Managed Care Guide
  - Financial Policy
  - Work/School/Health Forms
  - Form Letters and Templates
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## MEDICATIONS

- Medication Supply Cabinet
  - Xylocaine
  - Oxygen Tank
  - Morphine
  - Diphenhydramine
  - Dextrose 50%
  - IV Set-up
  - Resuscitation Kit
  - Purge System
  - Compliance Plan
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## SUPPLIES

- Cloth Gowns
  - Sheets – Paper/Fabric
  - Assorted Syringes/Needles
  - Assorted Tapes
  - Alcohol Pads
  - Iodine Pads
  - Lubricating Jelly
  - Examination Gloves
  - Sterile Gloves
  - Topical Skin Freeze
  - Hemostats
  - Soap Dispenser
  - Band-Aids
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## PATIENT COMFORT ITEMS

- Hand Soap
  - Paper Towels
  - Toilet Tissue
  - Facial Tissues
  - Sanitary Napkins
  - Aspirin/Acetaminophen
  - Paper-cups
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