

Checklist for New Practitioners [Chiropractic/Massage]

Subject / Action Needed	Who does it?	Finish Date
1. Credentialing		
a) State Licensing		
i) Obtained?		
ii) Applied?		
b) Medicare Credentialing		
i) Obtained?		
ii) Applied?		
c) Contact CMS (Medicare) to add practitioner to clinic or convert solo practice to group practice.		
2. Insurers/Network Credentialing & Contracting		
i) _____ (name of organization)		
(1) Obtained?		
(2) Applied?		
ii) _____ (name of organization)		
(1) Obtained?		
(2) Applied?		
iii) _____ (name of organization)		
(1) Obtained?		
(2) Applied?		
iv) _____ (name of organization)		
(1) Obtained?		
(2) Applied?		
v) _____ (name of organization)		
(1) Obtained?		
(2) Applied?		
3. Malpractice and Other Insurance		
a) Review and assure adequate malpractice and liability coverage		
b) Add Workers Compensation		
c) Add Life & Health Benefits		

4. Business Relationship/Structure		
a) Review business relationship to assure appropriate legal compliance, e.g. employment, partner, independent contractor		
b) Obtain necessary tax and business forms		
c) Obtain and assure compliance with past contracts, e.g. non-compete agreements from prior practice		
5. Equipment and Office Supplies		
a) Determine and order office furniture, computers, phones, and health care equipment for practitioner		
b) Order business cards, letterhead and other personalized supplies including building directory and advertising signage		
c) Periodical and information system subscriptions		
d) Keys, combinations, and passwords		
6. Professional memberships		
a) State professional association membership		
b) National professional association membership		
c) _____		
7. Vendors and Service Providers		
a) Notify suppliers and service vendors of new practitioner including telephone directory and mail services		
b) Notify professional service providers, e.g. accountant, attorney		
8. Business Development		
a) Advertising announcements		
b) Amend existing advertisements, directories, & information		
c) Notify past and current patients		
9. Orientation and Expectations		
a) Training in office policy and procedures including HIPAA, employment, and personnel practices		
b) Training in office record and billing procedures		
c) Establish and communicate practitioner productivity and work expectations along with timeline for future review		
d) Continuing education expectations and support		
e) Regulatory compliance program, e.g. anti-rebate laws		
f) Security, Data protection, and Data Breach Training		