Practice Start-up Checklist

- ✓ Choose an attorney who has knowledge of the type of business you wish to start
- ✓ Choose an accountant
- ✓ Choose a corporate form after consultation with attorney and accountant
- ✓ Choose a name for your business
- ✓ Do a “name search” to make sure the name is available on your Secretary of State’s website
- ✓ Determine who will serve as registered clerk for the organization
- ✓ Decide who will serve as directors and officers of the organization and have attorney draft articles
- ✓ File appropriate paperwork with the secretary of state
  - o Articles of Incorporation
  - o “Doing Business As” (DBA) form if using an assumed name
- ✓ Have attorney develop shareholders agreement (for a corporation) or operating agreement (for an LLC)
- ✓ Issue stock certificates (if applicable)
- ✓ Apply for federal and state tax ID numbers
- ✓ Complete Check the Box form for Federal Tax election
- ✓ Apply for federal and state unemployment ID numbers if entity will have employees
- ✓ Obtain other business licenses and tax ID numbers as required for local jurisdiction
- ✓ Obtain NPI number for organization
- ✓ Determine whether you will be a participating or non-participating with Medicare
  - o Fill out Participating Provider Agreement (Form 460) and
  - o EFT Authorization Agreement (Form 588)
- ✓ Fill out Medicare Enrollment Application (855I), then reassign Medicare payments from individual to organization (Form 855R)

Practice Start-up Checklist

- ✓ Fill out Medicare Enrollment Application for Clinics/Group Practices (Form 855B)
- ✓ Complete provider applications for other payers entity will do business with
- ✓ Obtain business and malpractice insurance
- ✓ Obtain workers' compensation insurance if required for employees
- ✓ Hold an organizational meeting
- ✓ Check your local county or city clerk's office for additional requirements
- ✓ File an initial annual report with the Secretary of State