OP PCP or Specialty clinic Setup Checklist

1. Pre-Planning & Approval

- ❑ **Determine clinic need & scope**- define the purpose, target patient population, and specialty focus.
- ❑ **Obtain Leadership & Financial Approval**- Secure budget and executive buy-in.
- ❑ **Identify location**- Lease/Purchase space or allocate within an existing facility.

2. Regulatory & Compliance

- ❑ **Obtain Necessary Licenses & Permits**- State medical board, DEA, CLIA, etc.
- ❑ **Ensure Compliance with OSHA & HIPAA**- Implement security and privacy protocols.
- ❑ **Credentialing & Insurance Contracts** – Enroll providers with Medicare, Medicaid, and private insurers.

3. Infrastructure & Facility Setup

- ❑ **Design and Renovate Clinic Space**- layout patient rooms, waiting areas, and workstations.
- ❑ **Install IT & EMR Systems**
- ❑ **Set up phone, internet, & Security systems**

4. Staffing & Training

- ❑ **Hire and onboard Clinical Staff**-Physicians, nurses, medical assistants, front desk.
- ❑ **Provide EMR & Process Training**- ensure staff are trained in documentation and workflow.
- ❑ **Develop Standard Operating procedures (SOPs)**- Policies for scheduling, billing, triage, etc.

5. Equipment & Supplies

- ❑ **Order & Install Medical equipment**- Exam tables, diagnostic tools, EKG, etc.
- ❑ **Stock Medical & Office Supplies**- PPE, syringes, charts, forms, etc.
- ❑ **Set up Medication Storage & Pharmacy Needs**- Compliance with controlled substances if needed.

6. Patient Services & Operations

- ☐ **Develop Appointment Scheduling System**- online, phone, or referral-based scheduling.
- ☐ **Implement Billing & Revenue Cycle Process**- train billing team and verify insurance workflows.
- ☐ **Create Patient Intake & Consent forms**- Ensure proper documentation and compliance.

7. Marketing & Community Outreach

- ☐ **Develop Branding & Signage**- ensure clear external and internal clinic branding.
- ☐ **Announce Opening Via Marketing Channels**- Website, social media, Local newspaper.
- ☐ **Engage with Referral Sources** – partner with PCPs, Hospitals, and specialists.

8. Final Readiness & Soft Launch

- ☐ **Conduct Staff training & Mock run**
- ☐ **Verify all systems are functional- EMR, billing, telehealth, phones, etc.**
- ☐ **Host a Soft Opening Before Official Launch**