

LAUNCH PLAYBOOK

The Complete Checklist for Opening a New Medical Practice

Complete checklist for opening a medical practice: legal, financial, operational, compliance, and growth items with owners and timing. Cash-pay: weeks.



SCAN TO BOOK A CALL

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A complete checklist for opening a medical practice covers five buckets: **Legal** (entity, EIN, NPI, licenses, DEA), **Financial** (malpractice, banking, payments, bookkeeping), **Operational** (EHR, scheduling, intake, space or telehealth), **Compliance** (HIPAA safeguards, BAAs, privacy notice, consents), and **Growth** (brand, website with booking, first-patient plan). **A cash-pay practice can complete every item in weeks because it skips the 90–150-day payer credentialing wait; an insurance-based practice should plan 6–12 months.** Work the phases below in order; items within a phase run in parallel.

This is the companion checklist to the full narrative sequence — for the *why* behind each item and the dependencies between them, read [How to Start Your Own Medical Practice From Scratch: The Complete Sequence](#).

Phase 0 — Before you build anything

EXHIBIT				
✓	ITEM	OWNER	TYPICAL TIMING	NOTES
<input type="checkbox"/>	Choose payment model: cash-pay (DPC/ concierge/functional) vs. insurance	You	Decide first	Determines every downstream item, including whether Phase 6 exists
<input type="checkbox"/>	Set target panel size and pricing	You	With model decision	DPC panels commonly cited at 400–800 patients; price to market and cost structure
<input type="checkbox"/>	Review employment contract: non-compete + moonlighting clauses	Healthcare attorney (your state)	Before any patient-facing step	Physician Non-Compete Clauses, Explained: What They Mean and Whether Yours Is Enforceable — foundation-building is generally fine; seeing patients may not be
<input type="checkbox"/>	Confirm personal runway: 6–12 months of expenses	You	Before committing	Launch speed ≠ panel ramp; most model 6–18 months to a sustaining panel
<input type="checkbox"/>	Decide telehealth / hybrid / physical space	You	With model decision	Physical build-out adds months and major cost

How many items are on a medical practice startup checklist?

FROM THE BRIEF

Phase 1 — Legal

EXHIBIT

✓	ITEM	OWNER	TYPICAL TIMING	NOTES
<input type="checkbox"/>	Form PC/PLLC per your state's rules	Attorney or formation service	Days–weeks, varies by state	Check CPOM ownership restrictions first How to Set Up the Legal Entity for Your Medical Practice (PC, PLLC, and the CPOM Problem)
<input type="checkbox"/>	Obtain EIN	You or delegable	Days	Needed for banking and Type 2 NPI
<input type="checkbox"/>	Confirm individual NPI; obtain organizational (Type 2) NPI via NPPES	You or delegable	Days	Both are needed
<input type="checkbox"/>	Verify active, unrestricted state medical license in every practice state	You	Weeks–months if new states needed	Includes each patient's state for telehealth Licenses and Credentialing You Need to Open a Clinic
<input type="checkbox"/>	DEA registration (if prescribing controlled substances)	You or delegable		Some states require a separate controlled-substance registration
<input type="checkbox"/>	State/local business licenses and permits	Delegable	Varies by locality	Often forgotten until a deadline

Phase 2 — Financial

EXHIBIT

✓	ITEM	OWNER	TYPICAL TIMING	NOTES
<input type="checkbox"/>	Bind malpractice insurance	Broker	Days–weeks	Claims-made vs. occurrence; resolve old-job tail coverage (can run five figures)
<input type="checkbox"/>	Open business checking	You	Days	Never commingle personal and practice funds
<input type="checkbox"/>	Set up payment processor / membership billing	Delegable	Days–1 week	Cash-pay needs recurring membership billing, not a claims module
<input type="checkbox"/>	Stand up bookkeeping	Delegable	Days	Clean books from day one
<input type="checkbox"/>	Build startup budget + payback model	You	Before spending	Line items: How Much It Costs to Start a Private Medical Practice (Real Numbers)

Phase 3 — Operational

EXHIBIT

✓	ITEM	OWNER	TYPICAL TIMING	NOTES
<input type="checkbox"/>	EHR / charting system, configured to your model	Delegable	1–3 weeks integrated; longer assembling a stack	One of the two items that most often stalls physicians
<input type="checkbox"/>	Online scheduling	Delegable	With EHR	Ideally native to the same system What Software You Need to Run an Independent Medical Practice
<input type="checkbox"/>	Patient intake and forms	Delegable	With EHR	Digital, signed before first visit
<input type="checkbox"/>	Secure (HIPAA-compliant) patient messaging	Delegable	With EHR	Core to membership models
<input type="checkbox"/>	Lab and pharmacy arrangements/ integrations	You + delegable	1–2 weeks	In-house labs trigger CLIA — see Licenses and Credentialing You Need to Open a Clinic
<input type="checkbox"/>	Space lease <i>or</i> telehealth platform	You	Telehealth: days. Lease + build-out: months	The single biggest optional timeline/cost item
<input type="checkbox"/>	Basic clinical supplies	Delegable	1–2 weeks	Scope-dependent

Phase 4 — Compliance

EXHIBIT

✓	ITEM	OWNER	TYPICAL TIMING	NOTES
<input type="checkbox"/>	HIPAA security risk analysis	You or compliant platform	1–2 weeks on a compliant platform; months DIY	Required — and the other most common stall point
<input type="checkbox"/>	Technical safeguards: encryption, role-based access, MFA, audit logs	Platform/vendor	With systems setup	Built-in if the platform is already HIPAA-compliant
<input type="checkbox"/>	BAA executed with every vendor touching PHI	You	Before any PHI flows	The rule: no BAA, no PHI HIPAA Compliance for a New Clinic: What You Actually Need on Day One
<input type="checkbox"/>	Notice of Privacy Practices published	Delegable	Days	Patient-facing requirement
<input type="checkbox"/>	Patient consent + financial-responsibility forms	Delegable	Days	Membership agreement too, for cash-pay
<input type="checkbox"/>	Workforce HIPAA training scheduled (annual) and documented	You	Before launch; recurring	Applies even to tiny teams

Phase 5 — Growth

EXHIBIT				
✓	ITEM	OWNER	TYPICAL TIMING	NOTES
<input type="checkbox"/>	Practice name and brand	You + delegable	1–2 weeks	Confirm name availability with entity filing
<input type="checkbox"/>	Website with online booking/enrollment	Delegable	1–3 weeks	Simple and high-trust beats elaborate
<input type="checkbox"/>	Google Business Profile	Delegable	Days	Free local visibility
<input type="checkbox"/>	First-patient enrollment plan	You	Before doors open	Network, community, story — not paid ads How to Get Your First Patients for a New Practice
<input type="checkbox"/>	Retention / recall workflow	Delegable	With EHR	Memberships compound when patients stay

Phase 6 — Insurance practices only

Skip this entire phase if you're cash-pay — that's why cash-pay opens in weeks.

EXHIBIT

✓	ITEM	OWNER	TYPICAL TIMING	NOTES
<input type="checkbox"/>	CAQH ProView profile complete and attested	You or delegable	1–2 weeks	The data hub most payers pull from
<input type="checkbox"/>	Payer enrollment applications submitted	Delegable	Submit as early as possible	Start the clock immediately
<input type="checkbox"/>	Commercial credentialing cleared	Payers	90–150 days (verified industry range)	You cannot bill until it clears
<input type="checkbox"/>	Medicare / Medicaid enrollment (if participating)	Delegable	Medicare ~15–90 days; Medicaid ~60–120 days	Varies by state and program
<input type="checkbox"/>	Billing/RCM workflow and coding support	Delegable	Before go-live	A whole overhead category cash-pay avoids

Launch-week verification

EXHIBIT

✓	ITEM
<input type="checkbox"/>	Test booking → intake → visit → payment end to end as a fake patient
<input type="checkbox"/>	Confirm every PHI vendor has a signed BAA on file
<input type="checkbox"/>	Verify malpractice certificate dates cover your first visit
<input type="checkbox"/>	Confirm prescribing workflow (and DEA number where applicable) works from your EHR
<input type="checkbox"/>	Charge and refund a real test payment through the membership/payment system
<input type="checkbox"/>	Publish hours, pricing, and booking link; announce to your network

How to use this checklist

Work Phase 0 to completion first — every later item depends on the model decision and contract check. Phases 1 and 2 run in parallel. Phases 3 and 4 run in parallel with each other once vendors are chosen. Phase 5 starts as soon as the name and pricing exist. Phase 6, if it applies to you, starts as early as humanly possible, because nothing you do shortens the payer-side wait.

What people get wrong with this list: physicians overwhelmingly stall on two items — EHR setup and HIPAA/consents — and on the meta-problem of doing all ~40 items alone, sequentially, in the evenings around a full-time job. Notice the "Owner" column: the large majority of items are delegable. None of them requires your medical judgment. The list is finite; treat the delegable items as delegable and the checklist stops being the reason you don't launch.

Reality check

A completed checklist gets you a clinic that is *open*, not a clinic that is *full*. Budget 6–12 months of personal runway, expect a 6–18 month ramp to a sustaining panel, and treat patient demand in your market as the one item no checklist can verify in advance — only a small live panel can. Items marked above carry timing estimates that vary by state or vendor; verify them for your state before you build your calendar around them, and use a healthcare attorney licensed in your state for the contract and entity items. Timeline detail: [How Long It Actually Takes to Open a Private Medical Practice](#). Costs: [How Much It Costs to Start a Private Medical Practice \(Real Numbers\)](#).

Frequently asked

How many items are on a medical practice startup checklist?

Roughly 40 discrete items across five buckets — legal, financial, operational, compliance, and growth — plus a sixth bucket (CAQH and payer credentialing) only if you bill insurance. Most are administratively simple; the difficulty is volume and unfamiliarity, not any single item.

What's the most commonly missed item when opening a practice?

BAAs are the classic one: practices go live with a vendor that touches PHI but never signed a Business Associate Agreement. Close behind are the old employer's tail coverage and local business permits. The launch-week verification table above exists to catch these.

What order should I complete the checklist in?

Phase 0 (model, contract, runway) first, then Phases 1–2 in parallel, then 3–4 in parallel, with 5 overlapping. If you bill insurance, submit Phase 6 applications the moment your NPIs exist — credentialing is the long pole and nothing else can shorten it.

Can someone else do most of this for me?

Yes. Almost everything except the model decision, pricing, and clinical scope is delegable to a launch service, attorney, or platform — which is exactly how cash-pay practices compress the checklist into weeks. The alternative is acting as your own general contractor across a lawyer, an EHR vendor, a biller, and a web developer.

Is the checklist different for a telehealth-only practice?

The structure is identical; you drop the lease/build-out and supplies items and add licensure in every state where your patients are located. Telehealth is the leanest version of the checklist and the fastest to complete.

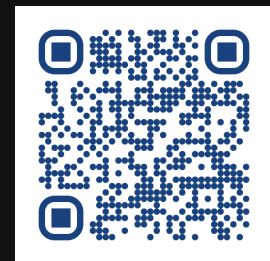
General information, not legal advice. State requirements vary — verify licensing, entity, and permit items with your state boards and a healthcare attorney licensed in your state.

HOW OPENWELL CAN HELP

Done-for-you, end to end.

If you'd rather hand off the delegable 80% of this checklist, Openwell runs the launch end to end for cash-pay practices — formation through HIPAA through go-live — and the system we set up is the one you run on afterward.

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RELATED OPENWELL BRIEFS

- [Physician Non-Compete Clauses, Explained: What They Mean and Whether Yours Is Enforceable](#)
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