

The Original
Dental CPAs
 a division of Naden/Lean LLC

CHECKLIST FOR A NEW DENTAL PRACTICE

<i>To Do Item</i>	<i>Person Responsible</i>	<i>Date Started</i>	<i>Date Completed</i>	<i>Comments</i>
Practice location				
Arrange for coverage				
Sign up with insurance plans				
Sign office lease				
Design office layout				
Create Entity				
Cash flow projection				
Arrange for working capital loan				
Open business checking account				
State license				
Federal narcotic license				
State narcotic license				
State unemployment #				
Federal I.D. #				
Medicaid #				
Medicare #				
Dental equipment				
Office equipment				
Dental supplies				
Office supplies				
Office furnishings				
Business cards				
Business stationery				

Dental record filing system				
Patient management\billing software				
Computer hardware				
Office telephone				
Answering/paging service				
Office policy and procedures manual				
Group health insurance				
Liability insurance				
Worker comp. ins.				
Life insurance				
Disability insurance				
Overhead disability insurance				
Fidelity bond insurance				
Malpractice insurance				
Select labs				
OSHA compliance				
Practice fee schedule				
Practice Superbill				
Personnel policies				
Employee job descriptions				
Seek job candidates				
Interview job candidates				
Make job offers				
Select collection agency				
Select method of appointment schedule				
Announcement cards				
Announcement in newspaper				

Announcement mailing				
Other direct mail?				
Practice marketing plan				
Medicare participation?				
Prepare participation agreement				
Employee computer training				
Patient info booklet				
Reception room periodicals				
Employee coding training				
Develop accounts payable system				
Prepare employee personnel files				
Payroll service				
Petty cash policy				
Bookkeeping controls and software training				
Front desk collection training				
Insurance verification training				
Insurance follow-up training				
Patient A/R collection training				
Select list of referring Doctors				
Select open house date				
Open house planning				
Who will prepare practice financial statements and when?				
Cell phone\ Pager				

