

Medical Practice Startup Checklist

A practical administrative checklist for organizing the registrations, identifiers, enrollment and billing setup commonly needed when establishing a U.S. medical practice.

Practice / Legal Name _____	DBA (if any) _____
Primary Contact _____	Target Opening Date _____

Business & Tax Setup

- Confirm business entity structure and state registration requirements.
- Obtain EIN from the IRS and retain confirmation documentation.
- Complete W-9 using the correct legal name, TIN and tax classification.
- Open practice banking and establish payment / deposit controls.
- Confirm local business licenses, permits and assumed-name filings where applicable.

Provider & Clinical Registrations

- Obtain or validate Type 1 NPI for each individual provider.
- Obtain or validate Type 2 NPI for the practice / organization where applicable.
- Confirm active professional licenses in each state of practice.
- Complete DEA registration and state controlled-substance registration where applicable.
- Determine whether CLIA certification is required for planned in-office testing.

Enrollment & Billing Readiness

- Establish CAQH profiles and supporting credentialing documents.
- Determine Medicare, Medicaid and commercial payer enrollment priorities.
- Confirm taxonomy codes, service locations, billing address and remit address.
- Select clearinghouse / EDI path and establish payer electronic transaction access.
- Document billing, coding, eligibility, authorization, charge capture and follow-up workflows.
- Establish malpractice coverage and retain current certificate of insurance.

Administrative resource only. Requirements vary by payer, program, state, specialty and organization. Verify current requirements with the applicable official source before submission. This resource is not legal, tax or clinical advice.