



Harris County Medical Society New Practice Checklist

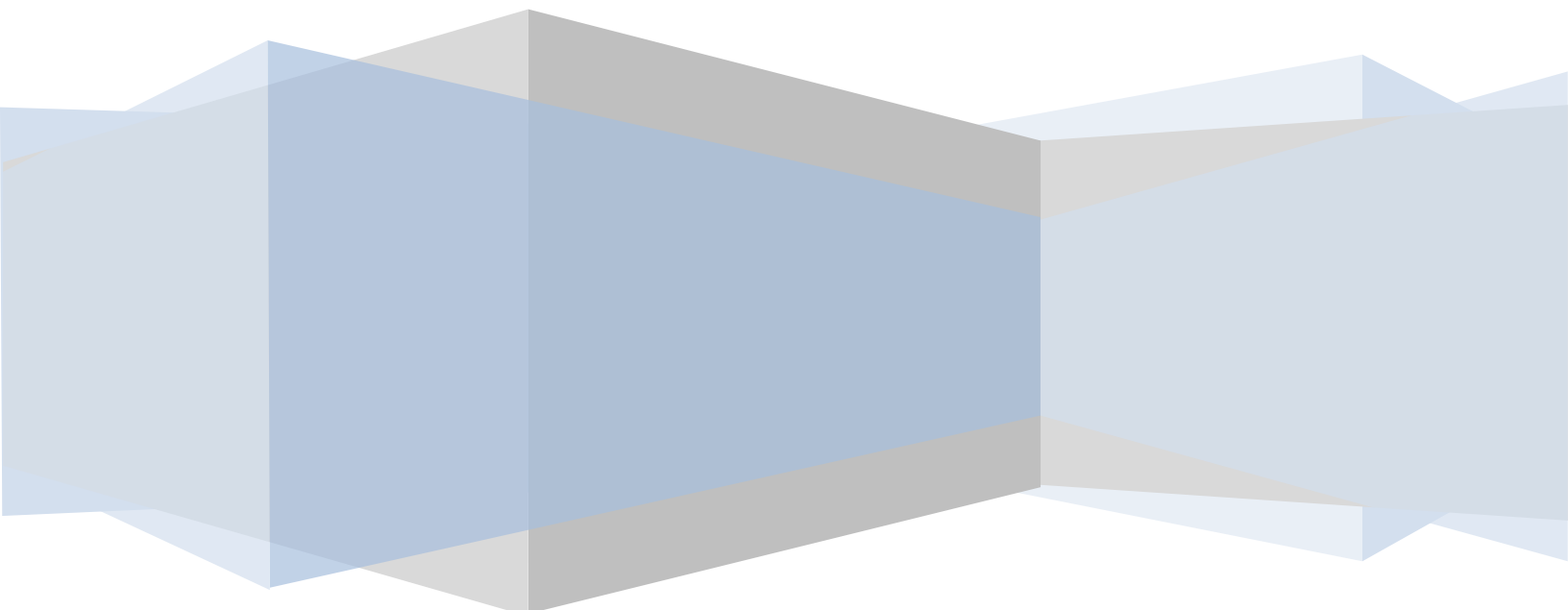


Table of Contents

Applications & Forms Request (Federal, State and County.....	2
Financial and Operations	4
Administrative Forms	4
Employee Hiring and Training	5
Office Equipment and Furnishings	6
Office Supplies and Services	6
Practice Development	8

Application & Form Requests

FEDERAL / NATIONAL OFFICES AND AGENCIES

Clinical Laboratory Improvement Amendments (CLIA) Registration - CLIA requires all entities that perform even one test from "materials derived from the human body for the purpose of providing information for the diagnosis, prevention or treatment of any disease or impairment of, or the assessment of the health of, human beings" to meet certain Federal requirements. If an entity performs tests for these purposes, it is considered under CLIA to be a laboratory and must register with the CLIA program.

Drug Enforcement Agency Registration (DEA)

Estimated Federal Income Tax Forms and Payroll Withholding Booklets

Federal Employer Identification Number (EIN) - SS-4 form and instructions.

Health Insurance Portability and Accountability Act (HIPAA) - Obtain comprehensive information regarding HIPAA compliance.

National Provider Identifier (NPI) – The Health Insurance Portability and Accountability Act (HIPAA) mandated the adoption of standard unique identifiers for healthcare providers. All physicians are required to have a NPI number to file claims for Medicare, Medicaid, and commercial carriers.

Medicare enrollment – There are several participation options to consider. You must have an individual NPI and tax ID number.

Medicaid Enrollment - All physicians performing medical services who wish to be eligible for reimbursement for Title XIX (Medicaid) benefits must complete the required Medicaid Provider Enrollment Application forms, and if applicable, enter into a written provider agreement. These forms are supplied by the Texas Medicaid and Healthcare Partnership (TMHP), the Texas Medicaid carrier.

Occupational Safety and Health Administration (OSHA) - Obtain information regarding OSHA compliance.

STATE OFFICES / AGENCIES

Radiation Registration - To obtain registration forms for all radiation related equipment (i.e. x-ray, laser, etc.) and notices.

Texas Department of Protective & Regulatory Services' Statewide Intake (SWI) Hotline – This secure website is used for non-emergency reports of suspected abuse of minors.

_____ [Texas Medical Board](#) (State Medical Licensing Agency)

COUNTY OFFICES / AGENCIES

_____ [Assumed Name Registration](#) - If you plan to use a practice name other than your name, call The Harris County Clerk's Office Information Line at 713-755-6405. You can also download the forms or complete online.

_____ **Hospital Medical Staff Privileges** – Contact the hospital where you will admit patients. Some managed care plans require hospital privileges even though you do not plan to admit patients. For a comprehensive list of hospitals in the greater Houston area, please refer to back cover of HCMS Pictorial Roster.

_____ [Payer Information](#) –Links to websites of all major payers operating in Harris County.

_____ **Commercial Payer Credentialing** – Most health plans in Houston retrieve credentialing information from the CAQH Universal Provider Datasource (UPD). Go to <http://www.caqh.org/ucd.php> to learn more about this free data collection service.

Financial and Operations

_____ **Partnership Agreement or Professional Corporation Documents (if applicable)**

Banking Relationships

_____ Financing

_____ Checking accounts

_____ Business

_____ Personal

_____ Merchant services/Credit card processing

_____ Deposit stamp for checks

_____ Electronic draft transfer

_____ **Accounting Firm** – (see the HCMS [Buyers Guide](#))

_____ **Law Firm** – (see the HCMS [Buyers Guide](#))

_____ **Office Location/Lease** Call 713-843-7187.

_____ **Establish Fee Schedule** – HCMS created a [Charge Master Calculator](#) based on expenses to help physicians develop a fee schedule.

_____ **Insurance Coverage** Call 713-843-7187 for referrals.

_____ **Health insurance and benefits for employees.**

_____ **Contracts for Lab, X-Ray, or MRI Services if Necessary**

Administrative Forms

_____ **Appointment Cards**

_____ **Business Cards**

_____ **Stationery** (letterhead, 2nd page, and envelopes)

_____ [Prescription Pads](#)

_____ **New Patient Registration Forms**

_____ **Patient Medical History Forms**

_____ **Charge Ticket**

_____ **Practice Information Brochures and Pamphlets**

_____ **Request for Release of Medical Records**

_____ **Return to Work/School Forms**

_____ **Hospital Rounds Records**

Employee Hiring and Training

_____ ***Employment Services** – [Favorite Staffing](#) provides employment services designed to locate permanent administrative and clinical employees for HCMS member practices. Services include personalized interviews, skills assessment testing, credential verifications, and criminal background checks at deeply discounted member rates. Review our [Staff Your Practice](#) page for resources.

_____ **Office Policy & Procedure Manual** - The Texas Medical Association has created an excellent [P & P manual](#) for the physician's practice.

_____ **Personnel Manual**

_____ **Payroll Software or Service**

- _____ **Office Personnel Training (if necessary)**
- _____ **OSHA Training**
- _____ **HIPAA Training** (see the HCMS [Buyers Guide](#))
- _____ **Designated HIPAA Privacy & Compliance Officer**
- _____ **Practice Management Services**
- _____ **[Required Posters and Notices](#)**

Office Equipment and Furnishings

Call 713-843-7187 for referrals.

- _____ **Medical Office Computer System** (hardware, software, connectivity)
- _____ **Practice Management System** (May be included in EHR, must be ICD-10 compatible)
- _____ **Internet Access**
- _____ **Practice Website**
- _____ **Copier with scanning capabilities**
- _____ **Dictating Equipment, if necessary**
- _____ **File Cabinets**
- _____ **Telephone System** (Get phone number for marketing, print material and website)
- _____ **Intercom System**
- _____ **Medical Equipment**
- _____ **Interior Decorator, if necessary**
- _____ **Reception Room Furniture**
- _____ **Exam Room Equipment and Furnishing**
- _____ **Back Office Furniture and Décor**
- _____ **Cell Phone**
- _____ **Fax Machine**

Office Supplies and Services

Call 713-843-7187 for referrals

- _____ **Answering Service**
- _____ **Practice Management Services** – Call 713-524-4267 and request practice management
- _____ **Filing Systems** (electronic or paper)
- _____ **CPT, ICD-10 and HCPCS Coding Books**
- _____ **Medical Exam Room Supplies**
- _____ **Petty Cash Box and Book**
- _____ **Collection Service**
- _____ **CMS 1500 Claim Forms** (paper claim form)
- _____ **CMS UB-92 Claim Forms, if needed** (Hospital paper claim form)
- _____ **Medical Reference Journals and Newsletters**
- _____ **Magazines for Reception Area**
- _____ **Medical Waste Management and Disposal, if necessary**
- _____ **[*Houston Academy of Medicine/Texas Medical Center Library Membership](#)**
Please call 713-795-4200 (Free for Harris County Medical Society members)
- _____ **[*HCMS Business EXPO](#)** – Offering solutions for the challenges of the medical practice. This daylong event is held every spring and fall at Reliant Center. It is free to HCMS members and their staff. Three free one hour CMEs are offered, usually at least one is Ethics credit. The expo hall is full of exhibitors who can improve how you run your practice and care for your patients. It's a great chance to compare products side by side, network with your colleagues, catch up on CME credit and even win some door prizes. Call 713-526-7378, ext. 274 for more information.
- _____ **[*CME Credit](#)** – HCMS offers free CME throughout the year at Branch meetings and the Business Expos. To find out which branch you are in call 713-524-4267. To learn more about the Expo call 713-524-4267, ext. 274.

Practice Development

- _____ **[*Membership and Active Participation in HCMS and its Branch Societies](#)**
(Southwest, Western, North, Southeast, East and Central)
- _____ **[*Membership and Active Participation in County Specialty Society](#)**
Contact LaCoya Boone at 713-524-4267

_____ **Web site development** - Call 713-843-7187.

_____ **Announcement of Practice in Local Newspaper**

_____ **Open House for Referring Physicians**

_____ ***Photo to Harris County Medical Society for Inclusion in the *Harris County Medical Society/Houston Academy of Medicine Pictorial Roster***
Contact Nancy Boone at 713-524-4267, ext. 221.

_____ **Contacts with Social Service Agencies & Other Agencies for Referrals**

_____ **Membership in Civic and Church Organization**

_____ **Marketing Services** - Call 713-843-7187 for referrals and to learn about how HCMS can help you market your practice to colleagues.

_____ **Potential Referring Physician Contacts**

_____ **Practice Signage**

_____ **Practice Newsletter**

_____ **Practice Referral Service**

_____ ***Harris County Medical Society**

_____ **Hospital**

_____ **HMO/PPO/IPA, ACO Participation**

_____ **Medicare Participation/Non-Participation Decision**

_____ **Legislative Officials** – Complete listing of US, state, and local representatives available in *HCMS Pictorial Roster* and on the *HCMS Web site* at www.hcms.org/advocacy/legislation/.