New Practice Checklist
Harris County Medical Society
Medserv, Inc
1515 Hermann Drive
Houston TX 77004
P 713-526-7378
F 713-526-2294
www.hcms.org, select Medserv/Practice Services

Congratulations on your new practice! This checklist is designed to assist physicians starting a new practice, expanding a practice, or relocating a practice to the greater Houston, Texas area.

The Harris County Medical Society (HCMS) offers a wealth of membership benefits and resource information to help make your venture a success. Physicians interested in locating a practice in Harris County should consider purchasing a *Harris County Medical Society/Houston Academy of Medicine Pictorial Roster*. This physician directory is a valuable resource tool and provides an overview of local county medical society services. Services offered directly through HCMS include the *HCMS/HAM Pictorial Roster*, the biannual HCMS Business Expo, and the physician referral service. For information on all HCMS offers visit www.hcms.org, or call 713-524-4267.

Medserv, the service company of the Harris County Medical Society, offers business support to physicians in private practice. The Employment Services Division provides a valuable method for hiring qualified administrative and clinical medical office personnel. Other physician services include business and personal credit cards, and referrals to companies providing products and services specific to medical practices.

Medserv and HCMS are committed to your new practice success. Products and services offered or endorsed by HCMS and Medserv mentioned in the practice checklist are indicated with an asterisk. Please call Medserv at 713/843-7187 for additional information.

If you are in need of further assistance in the start up of your medical practice, the Texas Medical Association (TMA) offers practice management consulting services. You may contact TMA Practice Consulting at 1-800-523-8776.

Our most sincere wishes for your new practice success!

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(Revised March 2015)
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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 – (Must have a NPI number for individual & 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 Controlled Substance Registration Number (DPS)

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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 Contracts – HMO, PPO, indemnity, workers comp, Tricare, etc. applications and forms. Links to websites of all major managed care plans operating in Harris County can be found at www.hcms.org. Select “Business of Medicine” then “Managed Care” for a listing and links of major companies in the Harris County area.

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 Call 713.843.7187 for referrals or click here

Financial

Checking accounts

Business

Personal

Merchant services/Credit card processing

Deposit stamp for checks

Electronic draft transfer

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Accounting Firm Call 713.843.7187 for referrals or click here

Law Firm Call 713.843.7187 for referrals or click here

Medicare Fee Schedule

Texas Medicaid Fee Schedule

Office Location/Lease Call 713.843.7187 for referrals or click here

Establish Fee Schedule (See Appendix)

Insurance Coverage Call 713.843.7187 for referrals or click here

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

Administrative Forms

Call 713.843.7187 for referrals or click here

Announcement Cards

Appointment Cards

Business Cards

Stationery: Letterhead, 2nd Sheets, and Envelopes

Prescription Forms

New Patient Registration Forms

Patient Medical History Forms

Charge Ticket

Practice Information Brochures and Pamphlets

Request For Release of Medical Records

Progress of Medication Notice

Return to Work/School Forms

Hospital Rounds Records

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Employee Hiring and Training

*Employment Services* – Ranked by the *Houston Business Journal* as one of the top 10 permanent placement firms in Houston, Medserv 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.

*Greater Houston, Medical Office Salaries Data* – Based on positions filled directly through Medserv’s Employment Services division, HCMS members may request information containing pay rates offered for the most frequently requested Medserv searches. The information is compiled with local data based on a current 12 month period. For a free copy, email your practice name and title to Rhonda@medserv-hcms.com.

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
Designated HIPAA Privacy & Compliance Officer
Practice Management Services

Office Equipment and Furnishings
Call 713.843.7187 for referrals or click here

Medical Office Computer System (hardware, software, connectivity, Web site design)
  EHR (Meaningful Use Stage 2 and ICD-10 compatible)
  Practice Management System (May be included in EHR and must be ICD-10 compatible)
Internet Access
Copier with scanning capabilities
Dictating Equipment, if necessary
File Cabinets

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_____**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**

_____**Cellular Telephone** ([HIPAA Compliant texting](#))

_____**Fax Machine**

**Office Supplies and Services**

Call 713.843.7187 for referrals [or click here](#)

_____**Answering Service**

_____**Practice Management Services** – Call 713-524-4267 and request practice management

_____**Clipboards for New Patient Registration, if needed**

_____**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** (Use updated [version 2/12](#))

_____**CMS UB-92 Claim Forms, if needed** (Hospital paper claim form)

_____**Computer Forms**

_____**Medical Reference Journals and Newsletters**

_____**Magazines for Reception Area**

_____**Medical Waste Management and Disposal, if necessary**

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**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. 200 for more information.

**HCMS/HAM Pictorial Roster** – Considered the number one benefit of membership by HCMS members year after year. Each HCMS member receives a free copy, and additional copies can be purchased at a discount. Here you will find your fellow members listed alphabetically and by specialty. Medical Practice Listings, in the front of the roster is an excellent place to promote your practice to your fellow physicians. The Roster is also an excellent resource for products and services that you may need as you open your practice. Refer to the index in the back of the Roster or view the electronic listing here.
- Roster Purchase – 713.524.4267, ext. 220
- Medical Practice Listings – 713.843.7187
- Product Referrals – 713.843.7187

**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 Holly Smith at 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 for referrals or click here

**Announcement to colleagues** – utilize HCMS DocList, a member only service provided by HCMS. You may build your address list by specialty, zip code, or entire membership. Minimal charges apply. Call 713.843.7187 for details.

**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.

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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