Clarion RCM

New Practice Administrative Startup Checklist

A suggested order of work for opening a practice. Start early; payers take time.

1. Foundation

- [ ] Choose a business structure and register the practice (ask your attorney or accountant)
- [ ] Obtain a federal tax ID (EIN)
- [ ] Open a business bank account
- [ ] Bind malpractice insurance for each provider

2. Provider identifiers and licenses

- [ ] Confirm or apply for the state license in every state of practice
- [ ] Obtain an individual NPI for each provider, and a group NPI if billing as a group
- [ ] Confirm taxonomy codes for each provider
- [ ] DEA and state controlled-substance registrations, if applicable

3. Credentialing and enrollment

- [ ] Create and complete the CAQH profile for each provider
- [ ] Choose the payers you plan to bill
- [ ] Submit credentialing and enrollment applications; record dates and reference numbers
- [ ] Set up electronic payments and remittance with each payer
- [ ] Confirm each effective date in writing before scheduling that payer's patients

4. Billing set-up and ongoing

- [ ] Choose your billing, EHR, and clearinghouse set-up
- [ ] Create a calendar for renewals, re-attestations, and revalidations
- [ ] Set a monthly review of denials and unpaid claims

Requirements differ by state and payer. Treat this as a starting point and confirm details for your own situation.

General information, not legal or financial advice. Requirements vary by state and payer.