

New Independent Practice Checklist

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1. Introduction

Taking the decision to establish a new independent practice is an exciting first step in your journey as a clinician. While transitioning to an independent practice comes with new responsibilities, it also opens the door to a more intimate way to provide care for your patients and deepen the patient-physician relationship. Whether you are coming from a different practice or are straight out of medical school, we've developed this brief guide to give you a step-by-step overview with resources and advice from successful independent practices.



2. Initial Planning

Just like any other business venture, opening your own independent primary care practice will involve a great number of details, both major and minor. To foresee and keep track of as many of them as possible, the first step in the process is to draw up business plans.

> Arguably the most important of these is **the budget**: setting down concrete numbers will help to define what is feasible, and create parameters for the overall strategic plan that should be drawn up alongside the budget.

3. Location

When creating the budget, it is important to have at least a general idea for your practice's location, as the lease you eventually sign will become the literal foundation for everything that's to come. Important considerations can include the demographics of the surrounding area, the accessibility of the location, and the amount of renovation needed to make the space compliant with the requirements of your practice.

4. Marketing Your Practice

Once you are in the process of signing the lease – or at least have a fair degree of certainty about your general location – it is time to start drafting your marketing plan. It is true that word of mouth is a potent marketing tool for primary care practices, but there is no reason to rely solely on one marketing tactic.

One important facet of your marketing plan is the brand or "image" of your practice. It's not just a name and logo – draft up a mission statement that clearly and concisely communicates to your future patients something of your values, your mission, or your professional culture. This will be of tremendous help when creating your online presence.

Remember to also think locally: since you will be serving the surrounding community, what are the best ways to get your message out to them?



5. Legal Advice

You will want to start looking for legal representation for your independent practice as soon as you begin the process. In addition to the intricacies of the legal structure of your practice that need to be fleshed out, there is a great deal of paperwork to be filed with various insurers and the state, as well as a myriad of forms your patients will eventually need to sign. While much of this can be parsed on your own time and dime, delegating this to a seasoned legal professional may end up saving you from potential headaches down the road – especially if there are local or state regulations whose particulars you may not be familiar with.



6. Loans

Careful planning alone is not enough to get an independent practice off the ground; a significant financial investment is also required, which may entail seeking out a suitable loan. More often than not, independent primary care practices tend to be stable earners – so you should have an array of options. For more in-depth information about your loan options, **click here**.

7. Online Presence

Once you have settled on consistent branding and logo that best reflects your practice, it is time to start building your online presence. Online searches have become a ubiquitous form of investigating goods and services, so a well-designed and visually appealing web portal will often act as a deciding factor for new patients in lieu of word-of-mouth. The recent pandemic has made telemedicine a required part of any successful practice, so providing interactive features like a patient portal for accessing health records and appointment schedules is strongly advised. In addition, a regularly-updated social media presence and a blog will keep your patients informed and engaged with healthcare trends pertinent to their lives and wellbeing. Finally, once the practice actually opens its doors and the website is live, you or your webmaster should pay close attention to local SEO optimization and keep tabs on user-driven review sites like Yelp and Google Maps to actively engage with both positive and negative feedback. For more information and helpful tips to demystify local SEO optimization, **please consult the following article**.





8. Technology

Everything from payroll management to health records to the phone system is now run by software systems, and their hardware platforms. This warrants careful consideration and budgeting, as each of these needs has a landscape of competing vendors to choose from – and they are not all created equal. The ideal software should minimize the time and effort spent on any given task, otherwise those valuable resources are wasted on figuring out and troubleshooting clunky and inconsistent systems. This is especially important for your electronic health records system: one of the leading causes of physician burnout is all the after-hours work that goes into using poorly-designed legacy EHR systems. Combined with the complex pay structures of insurance billing, an overly complicated EHR system can even cost you revenue from filing errors. Learn how Elation's EHR system **makes insurance billing hassle-free.**



9. Office Support and Staffing

The complexities of running an independent primary care practice will require office staff. Figuring out a list of all the tasks your staff will be performing will help you to figure out exactly how many employees to hire, and make the appropriate allocations in your budget. There are many factors to consider here, such as your working habits and the extent to which your chosen technology can automate various tasks. Finding the right employees can often be even more challenging than attracting new patients, so you will want to make sure they not only undergo technical training and complete all the legally required certification, but also learn the more ephemeral aspects like workplace culture and values. Since your supporting staff will be on the front lines of patient engagement, this crucial training period must be accounted for in the strategic plan.

10. Last Steps

Before the office can open its doors, there are many other details to keep track of, both major and minor. Acquisition of furniture and equipment, vendors of auxiliary services (e.g. medical waste disposal, janitorial needs, insurance), certifications and inspections – all this must be accounted for in the budget and the strategic plan. If you choose to offer in-office testing, this will also require extra certification and compliance. Double-check with your legal advisor to make sure you have all of the regulatory and insurance matters in order, especially since states often have their own requirements.



11. Succeeding in Independent Primary Care

Now, 36 years into practicing medicine in Honolulu, Dr. Roger Kimura can hardly imagine doing anything else. While Dr. Kimura **built a practice that is uniquely his**, the tools and tips he offers can apply to physicians everywhere. Although success is no easy task in independent primary care, he suggests his is due to the following:

• **Focus on quality improvement.** Dr. Kimura prioritizes evidence and evolution, which means he must also prioritize data collection and analysis. By leveraging his EHR system and employee input, Dr. Kimura evaluates processes, adjusts protocols, and capitalizes on opportunities for improvement. "*If anybody practices in a way where there's never any change, they're going to be left behind*", he says.

• **Adopt an EHR system with a human-centered design.** For six years, Dr. Kimura used an EHR that caused more headaches than happiness. After learning of Elation Health from receiving a referral letter from another doctor, he became the second doctor in Hawai'i to adopt the technology. The system's focus on efficiency meant Dr. Kimura could keep his patients at the forefront. He points to his EHR as a defense against burnout, a rare sentiment among physicians.

• **Participate in innovative value-based payment programs.** Dr. Kimura joined a program payment transformation initiative through the Hawaii Medical Service Association, an insurer affiliated with Blue Cross Blue Shield. The program provides monthly capitation payments for each member who identifies as a patient of Dr. Kimura, regardless of how often they come in for an appointment. To maintain payment levels, Dr. Kimura must document his adherence to quality care and appropriate patient access and hit certain goals. Overall, he says, the value-based care effort has increased time spent with patients and provided a steady stream of revenue.



12. Additional Resources

Elation Health Blogs:

Elation Health's blogs regularly publish independent practice-focused content that can help you stay on top of today's healthcare landscape so that you have more time for your patients. Posts are written by healthcare experts and cover a wide variety of topics including policy news, primary care research and trends, and resources for alternative practice models. Save time and energy by getting relevant and timely posts like these when you subscribe:

- **Financial success tips for new practices**
- **How to establish an emotional connection with your patients**
- **How to maintain a digital marketing routine for your independent practice**

Elation's Resource Center:

Elation Health's resource center was built as a one-stop shop for finding all the most relevant information for independent physicians from HIPAA compliance to marketing your practice. We recently updated our resource center to reflect new and emerging topics relevant to the way independent physicians deliver care.

13. About Elation

Elation Health is the most trusted technology platform for independent primary care. Since 2010, the company has delivered clinical-first solutions — built on an award-winning collaborative EHR platform — that helps practices start, grow, communicate, and succeed in delivering the highest-quality personalized care to patients. Elation Health is empowering primary care providers to uphold the craft of medicine, while thriving in an evolving healthcare landscape. Today, Elation Health serves 23,000 clinicians caring for 9.3 million Americans.

Learn more at **elationhealth.com**, **LinkedIn**, and **Twitter**.