Practice administration startup checklist

Authority, business, systems and launch tasks, each with an owner, dependency, evidence, date and status.

This worksheet helps organize a decision and its evidence. Enter the exact source, date and context. Unknown information remains an open question. The worksheet does not establish admission, professional authorization, legal compliance or financial viability. Keep completed records privately and do not send client or patient information to this website.

- Assign every task an owner, the evidence that shows it is done and a date. Record what each task depends on.
- Do not treat a downloaded checklist as permission to practice. Check the responsible authorities for your jurisdiction.
- This publication supplies planning structure, not individualized legal, tax, clinical or insurance advice.

Status: write not started, in progress, done or not applicable.

These are planning prompts, not jurisdiction-specific legal instructions.

01 Authority and adviser checks

Start with the responsible authorities and advisers for the actual jurisdiction and business.

No.	Task	Owner	Dependency	Evidence	Date	Status
A1	Identify the responsible regulator for the jurisdiction where you will practice. Evidence to keep: Regulator name, page and date checked					
A2	Engage a business formation and tax adviser. Evidence to keep: Adviser, scope agreed, date					
A3	Review insurance needs with a qualified adviser. Evidence to keep: Cover types discussed, quotes, date					
A4	Confirm the public titles you are permitted to use. Evidence to keep: Regulator source and date					
A5	Your own task					
A6	Your own task					

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02 Business and facility

Define what the practice will offer and what it can afford before committing to premises or systems.

No.	Task	Owner	Dependency	Evidence	Date	Status
B1	Define the service scope. Evidence to keep: Written scope, reviewed against the regulator source					
B2	Set the operating budget. Evidence to keep: Budget workbook version and date					
B3	Set the startup cash reserve. Evidence to keep: Reserve amount and how it was decided					
B4	Confirm premises and accessibility responsibilities. Evidence to keep: Lease or agreement clauses, adviser notes					
B5	Your own task					
B6	Your own task					

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03 Systems and workflows

Software cannot be fully configured before the real roles and workflows are defined. Test with synthetic records only.

No.	Task	Owner	Dependency	Evidence	Date	Status
S1	Map roles and access. Evidence to keep: Role and access map, version and date					
S2	Review the vendor contract. Evidence to keep: Signed terms, plan, region and renewal date					
S3	Run synthetic tests of each workflow (no real patient data). Evidence to keep: Demo scorecard or test log					
S4	Confirm backup and export. Evidence to keep: Export tested, format, date					
S5	List incident contacts. Evidence to keep: Contact list location and review date					
S6	Your own task					
S7	Your own task					

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04 Release and operations

Open only when the actual permissions, information and people are in place.

No.	Task	Owner	Dependency	Evidence	Date	Status
L1	Confirm the actual permissions are complete. Evidence to keep: Permission references and dates					
L2	Check all public information (website, listings, materials). Evidence to keep: Pages checked and date					
L3	Train staff on the configured workflows. Evidence to keep: Who, what and when					
L4	Assign monitoring and support. Evidence to keep: Named owners and review schedule					
L5	Your own task					
L6	Your own task					

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