

New Practice Transition Workbook

Condensed Version

1 out of 15 pages

A guide to successfully setting up your private dental practice

1. **Business set up**
 - Business set up (S Corp/LLC/EIN/EFT)
 - NPI 1 and 2
2. **Phones: VoIP vs. landline**
3. **Insourcing/outsourcing via Dental Virtual Assistants (DVA) & AI**
4. **Banking/Accounting/Credit Cards/Accounts Payable**
 - Banking, credit cards, QBO, reconciliation, payroll, tax filings and due dates
5. **Patient/team communication for transition**
 - Letters, team, patients, 1:1's, re-hire process, coordination of mid-treatment care
6. **Data privacy**
 - Passwords, encryption, BAA, e-docs
7. **Building and environment**
 - Signage, interior/exterior, calming experience, tech, maintenance
8. **Lab/referral partners**
9. **Equipment**
 - Inventory and maintenance schedules
10. **Legal**
11. **Accountant**
12. **Software implementation**
 - Practice management, data analytic, patient engagement, claim management, scheduling and more
13. **Fees/Insurance Landscape**
 - Fee schedule, credentialing, negotiations on reimbursements
14. **Practice Insurance**
 - Business liability, malpractice, data breach, work comp, disability, life
15. **Marketing**
 - Branding, website, patient growth
16. **Hiring/onboarding/retention**
 - Benefit package, compensation, employee handbook, compensation calculator, offer letters compensation formulas and more.
17. **OSHA/Radiation Safety/Safe Patient Handling**
 - X-ray calibration, OSHA, med emergencies, CPR, SDS, HIPPA, hazardous waste
18. **Supplies**
 - Clinical, front office, products
19. **Marketing engagement (specialist only)**
20. **Practice organization**
 - Managerial calendar, contact list, forms
21. **Revenue cycle management**
 - Merchant services, financial policy, MMR, CC surcharge, provider
22. **Community involvement**
23. **Patient Financing**
24. **Professional involvement**
25. **New patient experience**
26. **Front office standard operating procedure (SOP) playbook for success**
27. **Clinical standard operating procedure (SOP) playbook for success**
28. **Annual vision day**