



Practice Start-up Checklist

Use this “checklist” for new oral and maxillofacial surgery practices. Please consult your local state board regarding professional ethics, regulations and codes of conduct. For helpful products as you start your practice, visit the [AAOMS Supplier Marketplace](#).

Starting a practice

- Determine site selection
- Decide on business organization structure
- Secure state dental license
- Secure anesthesia permit
- Complete Office Anesthesia Evaluation (OAE)
- Reach out to state Department of Revenue
- Secure National Provider Identifier (NPI)
- Secure city or village permit/building permit
- Reference the OMS Buying Guide – Equipment, Office Furnishings, Supplies and Drugs
- Hire staff/finalize employment eligibility process (I-9 forms)
- Comply with federal and state-mandated staff training
- Determine practice logo and name
- Set-up bank accounts
- Review and sign insurance contracts
- Comply with OSHA poster requirements
- Obtain DEA license
- Secure malpractice, liability, property and business insurance
- Choose an accountant/finalize practice financing
- Obtain legal counsel
- Choose an architect
- Secure workers compensation, employee healthcare
- Determine overhead expenses
- Identify disability income
- Identify professional liability
- Determine federal IRS requirements
- Secure an IRS Taxpayer Identification Number (TIN)
- Perform BLS/ACLS/PALS training with staff
- Establish an advertising and marketing plan
- Comply with the Americans with Disabilities Act (ACA Section 1557)
- Follow the AAOMS Parameters of Care
- Research ASI partners for utilization at [AAOMServices.org](#)

Annual tasks

- Determine educational meetings for doctor and staff
- Secure business overhead insurance
- Perform equipment maintenance
- Renew allied staff member dues
- Review fee schedules
- Perform insurance contract review
- Renew AAOMS dues and consider contributions to OMSPAC and the OMS Foundation
- Ensure employees receive vaccines and immunizations
- Check for changes to the Americans with Disabilities Act
- Review referral trends
- Purchase new coding books – check compliance manual updates
- Renew or join the AAOMS registry [OMSQOR](#)
- Renew DEA license (for each location)
- Renew state dental license (if necessary)
- Renew anesthesia permit (if necessary)
- Complete x-ray registration
- Perform HIPAA training with all staff
- Perform OSHA training with all staff
- Perform BLS/ACLS/PALS training with staff
- Update federal and state labor law posters

Quarterly tasks

- Conduct employee reviews/appraisals
- Perform referral trend review
- Perform anesthesia emergency simulation review
- Review product warranties (additional charges, renewal options)
- Engage in team building – reward excellence
- Review CMS programs (EHR & payments)
- Ensure the compliance coordinator reports findings to doctors and staff and initiate corrective action

Monthly tasks

- Practice emergency drills with staff
- Conduct medication expiration audit
- Run month-end report (production charges, adjustments, collections, A/R)
- Review referral marketing activities
- Perform crash cart maintenance
- Check state and federal regulatory changes for the OMS office and staff

Semimonthly tasks

- Run payroll
- Perform inventory/ordering (ensure supplies are acceptable in state)
- Maintain FDA RECALL log ([FDA.gov/Safety/Recalls/](https://www.fda.gov/safety/recalls/))
- Perform bio-hazardous waste disposal (depends on practice needs)
- Perform software updates

Weekly tasks

- Perform biologic sterilization testing
- Call patients with upcoming appointment reminders
- Conduct meeting with the OMS, practice manager, marketing and administrator
- Perform extensive office cleaning
- Organize all forms, worksheets, brochures, etc.
- Update social media platforms
- Send out survey for recent patient reviews

Helpful websites

- AAOMS compliance manuals – [AAOMSstore.com](https://www.aaoms.com/AAOMSstore.com)
- AAOMS supplier marketplace – [AAOMSSupplierMarketplace.com](https://www.aaoms.com/AAOMSSupplierMarketplace.com)
- Americans with Disabilities Act – [ADA.gov](https://www.ada.gov)
- [ASI Partner – AAOMSServices.org](https://www.aaoms.com/ASIPartner)
- Centers for Disease Control and Prevention’s dentistry guidelines – [CDC.gov](https://www.cdc.gov)
- Centers for Medicare & Medicaid Services – [CMS.gov](https://www.cms.gov)
- City or Village occupancy/building permit – [ADA.org](https://www.ada.org)
- Drug Enforcement Administration – [DEADiversion.USDOJ.gov](https://www.dea.gov)
- Employment eligibility – [USCIS.gov](https://www.uscis.gov)
- Federal Trade Commission /Red Flag Rules – [FTC.gov](https://www.ftc.gov)
- HIPAA compliance information – [ADA.org](https://www.ada.org)
- IRS Taxpayer ID Number (TIN) – [IRS.gov](https://www.irs.gov)
- Labor law posters – [DOL.gov](https://www.dol.gov)
- National Plan & Provider Enumeration System – [NPPES.CMS.HHS.gov](https://www.nppes.cms.hhs.gov)
- Occupational Safety and Health Administration’s dentistry guidelines – [OSHA.gov](https://www.osha.gov)
- OMSNIC – [OMSNIC.com](https://www.omsnic.com)
- State dental associations – [ADA.org](https://www.ada.org)
- State dental boards – [DentalBoards.org](https://www.dentalboards.org)
- State Departments of Revenue – [IRS.gov](https://www.irs.gov)
- U.S. Environmental Protection Agency – [EPA.gov](https://www.epa.gov)
- U.S. Food & Drug Administration – [FDA.gov](https://www.fda.gov)
- Workers compensation – [OMSNIC.com](https://www.omsnic.com)