

# **THE ULTIMATE DPC STARTUP GUIDE**

**For startup, growing and  
established DPC practitioners**

**Learn how to:**

- **Build & engage with DPC communities**
- **Select the best software for your practice**
- **Ensure compliance with industry standards**

# THE ULTIMATE DPC STARTUP GUIDE

## I. EXPLORE DPC COMMUNITIES

### ☐ DPC FRONTIER

- The largest aggregation of resources for aspiring DPC doctors.
- Find information on conferences, blogs, and [DPC Mapper](#).
- Spend time exploring the site [here](#).

### ☐ DPC CONFERENCES AND RESOURCES

- Consider attending at least one, as they all have components geared towards helping new practices and you'll be surrounded by other existing and new DPC docs.
- Three main DPC conferences each year:
  - [DPC Summit](#) (AAFP, FMEC, ACOFP)
  - [Hint Summit](#) (Hint)
  - [DPC Nuts and Bolts](#) (Docs 4 Patient Care Foundation)

### ☐ DPC NATION

- Patient-centric site focused on educating patients about DPC.
- Find their site [here](#) help educate your patients about DPC.

### ☐ FACEBOOK GROUPS

- Join various Facebook groups for DPC practitioners.

FOR EXAMPLE:

- [NPs & PAs in Direct Primary Care \(DPC\)](#)
- [Direct Primary Care](#)

### ☐ DPC ALLIANCE

- National advocacy and support organization formed in 2018.
- Check out their resources at [DPC Alliance](#).

### ☐ REGIONAL DPC ALLIANCES

- Look for a regional alliance in your area.
- Connect with other DPCs for office tours and workflow discussions.

### ☐ DPC GUIDES

- ["The Official Guide to Starting Your Own Direct Primary Care Practice" by Doug Farrago](#)
- ["Startup DPC: How To Start And Grow Your Direct Primary Care Practice" by Paul Thomas](#).

## II. VIABILITY

### ☐ CONSIDER WORKING AS AN EMPLOYED DPC PHYSICIAN

- If you're not inclined to run a small business, work as an employed physician in a DPC practice.
- Check job listings on [DPC Frontier's Careers page](#) or [iamdirectcare.com](#).
- Reach out to local DPC practices directly.

### ☐ CHECK LEGAL HURDLES IN YOUR STATE

- Review state-specific regulations compiled on [DPC Frontier](#).

### ☐ PLAN FOR PATIENT ACQUISITION

- Assess your community presence and patient migration potential.
- Consider the enforceability of non-compete clauses and review state statutes on physician non-competes.
- Discuss your transition plan with your patients using intake forms from your EMR, like [Akute Health](#), which measure new patient confidence/excitement. This allows you to track over time how well you are transitioning patients and what areas you can improve in.

### ☐ ASSESS YOUR LIKEABILITY

- Ensure your personality and approachability can foster word-of-mouth referrals and patient satisfaction.

**Looking for more DPC resources?  
Visit our blog here**



### III. INITIAL DECISIONS

## PICK A BUSINESS NAME

- Choose a legal business name quickly and check its availability using your state's online tool.

#### **PICK A MARKETING NAME**

- Decide on a public-facing name considering future expansion and social media handle availability.
  - Use a tool like [Namecheckr](#) to search social handle availability.
- Choose a name that is easily searched for via Google as well, and check that the domain is available using a tool like [Squarespace](#).
- If you plan to hire additional physicians or take on partners at some point, you probably don't want to name the practice after your name, unless you're well known.

## DECIDE ON BUSINESS HOURS

- Determine if you need posted business hours or if you'll be available by request.

**SPECIALIZE**

- Consider specializing in areas like pediatrics, geriatrics, sports medicine, weight loss, etc.

☐ PURE OR HYBRID PRACTICE

- Decide if you will accept insurance for certain patients or services.
- Understand the implications for HIPAA compliance and state regulations.
- Learn more on [DPC Frontier's Guide](#).

#### IV. SCOPE OF PRACTICE

☐ **EXPAND YOUR SCOPE OF PRACTICE**

- Watch this presentation by [Drs. Lassey & Tomsen](#) on this topic.

**IN-OFFICE DISPENSING**

- Dispense medications directly to patients in order to save the patient a trip to the pharmacy and a considerable amount of money for certain drugs.
- Some states require licenses, impose limitations, or outright don't allow it - see [DPC Frontier's state-by-state legal analysis](#) for details.

**CONSIDER OFFERING THE FOLLOWING PROCEDURES/SERVICES:**

## JOINT INJECTIONS

- Offer joint injections as a service.

## MINOR PROCEDURES

- Perform minor procedures like vasectomies, hemorrhoid excision, and abscess I&D.

## CASTING AND COSMETIC PROCEDURES

- Offer casting and cosmetic services.

**□ OMT, VACCINES, AND PHYSICALS**

- Provide osteopathic manipulative treatment, vaccines, and physical exams.

**SPECIALTY SERVICES**

- Stress testing, bone density testing, travel medicine, phlebotomy, and more.

☐ HOSPITAL CARE COORDINATION

- Provide support during hospital stays.

**OBSTETRICS**

- Offer obstetric care if feasible.

## WEIGHT-LOSS SERVICES

- With many patients wading into the new world of weight loss drugs, many will need more personalized support that they may not be getting from the big telehealth companies prescribing these.

## V. PRICING

☐ CHOOSE MEMBERSHIP PRICES

- Decide on a pricing model: flat rate, age tiers, family plans, etc.
- Consider access/quality tiering for premium services.
  - Example: Premium plan for same-day scheduling, more advanced procedures, home visits, etc.
- Choose if you want to charge an enrollment fee.
- Potentially charge a per visit fee.
- Check out what other practices are doing on [the DPC Frontier Mapper](#).

## RE-ENROLLMENT POLICY

- Establish a policy for patients rejoining the practice.
  - To prevent on-again-off-again behavior, charge a re-enrollment fee of at least twice your monthly fee. Some DPCs require back-payment of all membership fees missed during the gap of membership. Do what is best for your practice and don't be afraid to change this as you learn your patients.

**I appreciate Akute Health for growing with me and being my support system as I grow my practice. It has helped make things not just easier and more efficient, but also fun.**

**- DR. GLENN, DPC OWNER FOR 20+ YEARS**

#### ☐ **RX MARKUPS**

- Decide whether to mark up in-office dispensed medications.
- As your practice grows, the labor involved with dispensing can become immense, so recognize that a markup fee could be necessary and still allows you to offer a great price compared to pharmacies.

#### ☐ **LAB MARKUPS**

- Determine if you will mark up lab work costs for any lab tests billed to your account by the lab.
- Keep in mind, some states have laws against price markup by physicians for pathology services; search for "anti-markup" states. In addition, more states require disclosure to patients of the actual cost charged by the lab. You should probably be doing this anyway for the sake of price transparency.

#### ☐ **PER-VISIT FEE**

- Consider a per-visit fee to manage visit demand.
- Per [the DPC Frontier](#), any visit fee must be lower than the monthly membership fee in order to qualify as a DPC.

#### ☐ **CASH-PAY VISITS FOR NON-MEMBERS**

- Offer one-off visits to attract new members.
- During the visit, describe DPC to the patient and offer to credit the visit cost towards their enrollment fee/first monthly fee. This can be a successful marketing tool.

#### ☐ **ONE-YEAR CONTRACTS**

- Consider annual contracts to simplify billing management.

#### ☐ **BILLING CYCLES**

- Decide whether to bill in advance or in arrears for membership.
- Billing at the end of the month (billing in arrears), helps qualify you as an eligible expense for patients paying with an HRA or FSA. Keep in mind that DPC memberships should not be paid from an HSA see DPC Frontier discussion [here](#). However, some DPCs accept payment from HSAs regardless.

## **VI. INCORPORATION**

#### ☐ **DETERMINE WHAT BUSINESS STRUCTURE IS BEST FOR YOUR NEEDS**

- First, check out your state's guidelines on professional entities. Some states require you to operate as a professional entity (PLLC or PC) instead of a generic equivalent ([LLC or Corporation](#)). Here's a [state-by-state rundown](#).

#### ☐ **DECIDE WHETHER AN LLC OR CORPORATION IS RIGHT FOR YOU**

- If you want to add an additional physician/partner at some point a [PC](#) will be easier. If you know you'll stay a solo practitioner, a PLLC could make more sense as This eliminates the need to do an independent corporate income tax return.
- You may likely want to confer with an accountant to make this decision, or look at other nearby practices.

#### ☐ **DRAFT ARTICLES OF ORGANIZATION/INCORPORATION**

This document serves to create a legal entity and provide basic information about it.

EXAMPLES:

Here is a [sample Articles of Organization](#) for an LLC.

Here is a [sample Articles of Incorporation](#) for an generic corporation.

#### ☐ **DRAFT AN OPERATING AGREEMENT/BYLAWS FOR THE COMPANY**

This document details the members' business interests and ownership shares, their rights and responsibilities as members, the allocation of profits and losses, and other protocols for managing and operating the business.

EXAMPLES:

Here is a [sample Operating Agreement](#) for an LLC.

Here are some [sample bylaws](#) for an generic corporation.

#### ☐ **FIND A REGISTERED AGENT & APPLY FOR YOUR EIN**

Apply for your Employer Identification Number (EIN)

The EIN is like the Social Security number for your business. It's the number the IRS uses to identify you. You can apply for one online [here](#).

#### **\*Legal Disclaimer\***

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## ☐ INCORPORATE THE BUSINESS THROUGH YOUR STATE

This can usually be done online through your states business center, just Google "[state] business entity formation". You'll need your Articles of Incorporation/Organization.

## ☐ FILE A DBA WITH YOUR STATE

- Unless you want to have "[Primary Care Name], PLLC" as your patient-facing brand, you should file a DBA (Doing Business As) form with your state.
- Google "how to file dba [your state]" for instructions.

## **VII. BUSINESS PLANNING**

### ☐ DRAFT A COMPREHENSIVE BUSINESS PLAN.

- Find an example [here](#).

### ☐ ESTIMATE INITIAL COSTS: RENOVATIONS, EQUIPMENT, LEGAL FEES, ETC.

### ☐ ESTIMATE OPERATING COSTS: RENT, UTILITIES, PAYROLL, ETC.

### ☐ ESTIMATE POTENTIAL REVENUES AND SET MONTHLY REVENUE GOALS.

### ☐ CALCULATE THE BREAK-EVEN POINT BASED ON COSTS AND POTENTIAL REVENUES.

## **VIII. FORMS**

### ☐ MEMBERSHIP AGREEMENT

- Find an example [here](#).

### ☐ PATIENT INTAKE FORMS

- Find an example [here](#).

### ☐ CONSENT FORMS FOR PROCEDURES

- Find an example [here](#).

### ☐ EMPLOYMENT CONTRACTS (IF HIRING STAFF)

### ☐ CHOOSE AN [EMR THAT ALLOWS YOU TO BUILD & CUSTOMIZE YOUR INTAKE FORMS](#).

## **IX. FUNDING**

### ☐ RESEARCH LOAN/ CREDIT LINE OPTIONS IF NECESSARY.

### ☐ DISCUSS WITH BANKS IF THEY OFFER FUNDING METHODS.

- Options may include lowering your interest rate, and/or taking a small business workshop class.

### ☐ LOOK INTO PHYSICIAN LOAN REVIEWS FOR SPECIFIC INSIGHTS.

- Review [this resource on physician loans](#) as a starting point.

### ☐ CONSIDER MOONLIGHTING AT YOUR LOCAL HOSPITAL.

- Another option may include working at a digital health/telehealth company part-time to supplement your income.

## **X. HIRING**

### ☐ USE PLATFORMS LIKE [ZIPRECRUITER](#) OR [INDEED](#) TO POST JOB LISTINGS.

### ☐ SET UP PAYROLL SYSTEMS WITH TOOLS SUCH AS [GUSTO](#), [TRINET](#), [RIPPLING](#), OR [QUICKBOOKS](#).

- Even if to just pay yourself, it is best to use a payroll software tool because they will manage payroll taxes, tax documents, and state reporting for you.

### ☐ CONSIDER OFFERING BENEFITS TO YOURSELF AND EMPLOYEES LIKE HEALTH INSURANCE, 401K, LIFE INSURANCE, VACATION, ETC.

- Your payroll software will help you set up and calculate costs for these benefits.

## **XI. ADMINISTRATION AND LOGISTICS**

### ☐ SET UP AN ACCOUNTING WORKFLOW USING TOOLS LIKE [QUICKBOOKS](#), [FRESHBOOKS](#) OR [WAVE](#).

### ☐ OPEN A BUSINESS CHECKING ACCOUNT WITH YOUR EIN AND INCORPORATION DOCUMENTS.

- It is best practice to not charge any business expenses to your personal bank/card. This keeps separation of business & personal expenses simple and straightforward. As you grow, you'll need to more properly track your P&L and Balance Sheet and having these separated makes that task much easier.

### ☐ APPLY FOR A BUSINESS CREDIT CARD TO MANAGE EARLY CASH FLOW NEEDS.

### ☐ UPDATE YOUR CONTACT INFO EVERYWHERE RELEVANT.

- After you've found a practice location (see section xii. "Location") and set up your website & email hosting (see section xv. "Website and Online Presence") and tell people your new information!
- Update nearby hospitals, practices, the DEA, state pharmacy board, state licensing office, city business licensing office, local labs, radiology centers, and anyone else in the medical community who knows you. You don't want referred patients or requisitioned lab results ending up at your old employer's office instead of your own.

## **XII. LOCATION**

### ☐ DECIDE WHETHER TO BUY, RENT, OR LEASE YOUR PRACTICE SPACE.

### ☐ FIND A SUITABLE LOCATION USING COMMERCIAL REAL ESTATE SITES OR LOCAL EXPLORATION.

### ☐ USE SITES SUCH AS [CREXI](#) AND [LOOPNET](#) WHICH FOCUS ON COMMERCIAL LISTINGS, AS OPPOSED TO ZILLOW.

### ☐ SET UP THE OFFICE SPACE AND FRONT-OFFICE CHECK-IN PROCESS.

### XIII. INSURANCE OPT-OUT

- ☐ **DECIDE IF AND WHEN TO OPT OUT OF MEDICARE AND COMPLETE THE NECESSARY AFFIDAVIT.**
  - This topic requires a bit of research and understanding. Read more on this topic from Dr. Phil Eskew on the DPC Frontier [here](#).
  - In addition, review [this guide from the AAFP on the opt-out process](#).
- ☐ **NOTIFY THE STATE MEDICAID PROGRAM IF YOU PLAN TO PRIVATELY CONTRACT WITH PATIENTS.**
  - Again, review the full analysis [from Dr. Eskew here](#).
- ☐ **NOTIFY PATIENTS OF PRIVATE INSURERS THAT YOU ARE LEAVING THEIR NETWORKS.**
  - You may need to do this through your employer, so discuss with your employer if they have any requirements.

### XIV. VENDORS

- ☐ **ESTABLISH RELATIONSHIPS WITH DRUG SUPPLIERS, LABS, AND IMAGING CENTERS.**
- ☐ **CONSIDER JOINING GROUP PURCHASING ORGANIZATIONS (GPOS) FOR BETTER PRICING.**
- ☐ **NEGOTIATE DIRECTLY WITH VENDORS IF NOT USING A GPO.**

### XV. WEBSITE AND ONLINE PRESENCE

- ☐ **PURCHASE A DOMAIN NAME AND SET UP A WEBSITE USING PLATFORMS LIKE [SQUARESPACE](#) OR [WORDPRESS](#).**
- ☐ **SET UP EMAIL HOSTING, PREFERABLY WITH HIPAA-COMPLIANT SERVICES LIKE [GOOGLE WORKSPACE](#).**
- ☐ **ESTABLISH SOCIAL MEDIA PROFILES AND OTHER ONLINE PRESENCE STRATEGIES.**

### XVI. SOFTWARE AND TOOLS

- ☐ **CHOOSE AN ELECTRONIC HEALTH RECORD (EHR) SYSTEM (E.G. [AKUTE ELATION](#), [HINT](#)).**
- ☐ **IMPLEMENT MEMBERSHIP MANAGEMENT AND PATIENT COMMUNICATION TOOLS.**
  - Best practice is to choose an EMR that includes these features or integrates with tools that offer these.
- ☐ **SET UP ADDITIONAL SERVICES AS NEEDED: E-PRESCRIBING, E-FAXING, DICTATION SOFTWARE, PATIENT SELF-SCHEDULING.**
  - To make it easier, you can choose an [EMR](#) that already offers these services.

### XVII. INSURANCE AND LEGAL

- ☐ **OBTAIN MALPRACTICE INSURANCE, PREFERABLY THROUGH AN INDEPENDENT BROKER.**
- ☐ **ENSURE COMPLIANCE WITH WORKERS' COMPENSATION AND DISABILITY INSURANCE REQUIREMENTS.**
- ☐ **CONSIDER BUSINESS INTERRUPTION, COMMERCIAL PROPERTY, AND AUTO INSURANCE IF APPLICABLE.**

### XVIII. CLIA COMPLIANCE

- ☐ **DECIDE WHETHER TO DO ANY IN-OFFICE TESTING**
  - **Home Testing Kits:** Many commonly performed in-office labs can now be performed by patients using home testing kits, such as HIV, Hep C, Strep, UTI etc.
  - **Limitations:** Home testing kits can be frustrating and time-consuming for patients, and some tests are not available as home kits. [Check the full list of CLIA-waived tests here](#).
- ☐ **CLIA-WAIVED TESTS: FILE FOR A WAIVER**
  - Fill out a [CMS-116 form](#) and submit it to your state's CLIA Agency. Look up your state's CLIA Agency [here](#). After submission, you'll receive a "remittance coupon" for paying the certificate fee.
  - States with additional requirements include: AZ, CA, CT, DC, FL, LA, ME, MD, MA, MI, NV, NJ, OR, PA, WA, and Puerto Rico. Do a Google search for specific state requirements.
- ☐ **CONSIDER OFFERING PHYSICIAN-PERFORMED MICROSCOPY (PPM) SERVICES**
  - PPM Services: PPM allows for waived tests and certain microscopic procedures. This requires compliance with various CLIA regulations (Patient Test Management, Quality Control, Personnel, Quality Assurance, and Proficiency Testing) and might not be worth the effort initially.
- ☐ **MAINTAIN BEST PRACTICES**
  - **Best Practices Document:** [Refer to this CDC document](#) for best practices in CLIA-waived facilities. The extent of implementation depends on your risk tolerance, but remember that CLIA-waived facilities are subject to random audits.
- ☐ **SET UP A REMINDER TO RENEW YOUR WAIVER EVERY TWO YEARS**
  - Email Reminders: Use [FollowUpThen](#) to schedule email reminders.

## **XIX. HIPAA COMPLIANCE**

### ☐ **DETERMINE IF YOU ARE A COVERED ENTITY UNDER HIPAA**

- Visit [DPC Frontier's HIPAA discussion](#) to determine if you are a covered entity.  
If not, you can ignore the rest of this list.

### ☐ **CHECK FOR STATE LAWS REGARDING PATIENT PRIVACY**

- Some states have stricter patient privacy laws than HIPAA. Research your state's requirements.

### ☐ **COMPLETE A SECURITY RISK ASSESSMENT**

- Use [this ONC tool](#) to simplify your security risk assessment.

### ☐ **DRAFT A NOTICE OF PRIVACY POLICIES (NPP)**

- Customize [this sample NPP from HHS](#) for your practice and publish it on your website.

### ☐ **DRAFT A RELEASE OF RECORDS AUTHORIZATION FORM**

- HIPAA requires a Release of Records Authorization form for non-treatment related disclosures. Find an [example form here](#). Log all signed forms in an Accounting of Disclosures log.

### ☐ **DRAFT A PATIENT CONSENT FORM**

- Though not required by HIPAA, a Patient Consent Form for communication methods (email, text, phone calls) offers additional protection. Find a [Sample Consent Form here](#).

### ☐ **GATHER AND MAINTAIN PROOF OF HIPAA COMPLIANCE**

- Create and maintain documents such as a Breach Plan, Training Plan, Communications Plan, Disaster Recovery Plan, Audit and Monitoring Plan, Policies and Procedures Manual, and data governance documentation. [AMA resources](#) and Kim Corba's [DPC Manual](#) can help.

### ☐ **GATHER BUSINESS ASSOCIATE AGREEMENTS**

- Secure a signed Business Associate Agreement from every entity handling your patients' health information. Find the template [here](#).

## **XX. OSHA COMPLIANCE**

### ☐ **FIND A BIOHAZARD/WASTE DISPOSAL SERVICE NEAR YOU**

- Follow standard protocols for handling hazardous chemicals and waste.

### ☐ **MAINTAIN A LIST OF HAZARDOUS CHEMICALS IN YOUR OFFICE**

- Keep a list of all hazardous chemicals.
- Make sure to print Safety Data Sheets (SDS). SDSs are [available online for free](#).

### ☐ **BUY A FIRE EXTINGUISHER AND MOUNT IT ON THE WALL**

### ☐ **PRINT THE OSHA POSTER AND PUT IT ON THE WALL**

- Download the [OSHA poster PDF here](#).

### ☐ **PUT YOUR EMPLOYEES THROUGH ANNUAL OSHA TRAINING**

- Use [Medtrainer](#) for online OSHA training and other certifications.

### ☐ **KNOW HOW TO REPORT INCIDENTS TO OSHA**

- Report any workplace incidents resulting in fatality or hospitalization using [this](#).

### ☐ **ORGANIZATIONS WITH MORE THAN 10 EMPLOYEES:**

- **Create a written emergency action plan.** OSHA's sample plan [here](#).
- **Incident Reporting:** Fill out OSHA [Form 301](#) for all workplace illnesses/injuries and log them in [OSHA Form 300](#). Annually, complete the [OSHA Form 300A](#). [All forms available here](#).

**Ready to implement a modern,  
customizable and seamless EMR?  
Contact a DPC implementation  
specialist today.**



**“Akute Health has made the transition from being part of a big hospital  
to going out on my own seamless, allowing me to provide the best care  
for my patients.”**

**- DR. Su-Anne Hammond, DO  
Family Medicine, DPC Owner**