

NEW PRACTICE CHECKLIST



Welcome to Practice on the South Island!

This comprehensive checklist is designed to assist you in building your new practice, no matter what stage of career you are in.

For more information on the South Island MSA, please visit www.southislandmsa.ca

OFFICE LOCATION

Consider your commute:

- Time travelling to and from work can impact the time you have for yourself, your family and your practice
 - University of Waterloo – Applied Health Sciences faculty, Margo Hilbrecht, Steven Mock, and Bryan Smale published “Highway to health? Commute time and well-being among Canadian adults” in the World Leisure Journal.
- Are there alternate routes to your office should there be poor weather or an accident/incident blocking the roadway?

Location, location, location

- Is the location you’re considering easily accessible by car, transit, and even bicycle?
- Can you access the parking via only one direction of travel, or can you turn into the lot by any route?
- Is there adequate parking? Are there fees for parking that you’ll need to notify your patients of when they’re attending their appointments?
- Is the building accessible for all mobility needs? Is the elevator reliable?
- Is the building close to other amenities that will be of benefit to you and your patients? (Pharmacy, lab, food, etc.)
- Does the building have fixed hours that will restrict access and potentially prevent your patients from attending at different times?

OFFICE SPACE

Physical Space

- Will this space be able to accommodate your needs as your practice grows?
 - Will you be adding more doctors to the practice
 - How many staff will be able to work in the space (MOA desk space?)
 - Is there adequate storage for supplies and filing, retention of records, etc.?
 - If the practice will be paper based, you will need to ensure extensive storage space is available.
- Consider the air quality, natural light, heating and cooling of the building
- Is the layout functional for you, your staff, and your patients?
- Does office allow for patients in wheelchairs or scooters to get in/out easily? Could emergency services bring in a stretcher if necessary?
- Is there a lavatory for your patients, or a private one for you & your staff?
- Is there a sink in your treatment rooms, or can one be put in?
- Is there some storage in the treatment rooms for additional tools, supplies, etc.?
- Is there a security system?

- Are there alternate entrance/exit to the space in the event of an emergency or situation in which the staff and/or patients need exit the building?
- Signage**
 - Name/logo on outside of building
 - Name/logo on the door
- What's included in the lease?**
 - Parking
 - Power/Heat
 - Water
 - Internet
 - Cleaning services
 - Building maintenance, repairs, renovations
 - Have you heard of Triple Net Leases? Review your lease with your lawyer to ensure you're aware of the risks/benefits to the proposed lease.
 - Single Net Leases: Tenant pays rent and property taxes
 - Double Net Leases: Tenant pays rent, property taxes, and insurance premiums
 - Triple Net Leases: Absolve the landlord of most risk of any net lease. Even costs of structural maintenance and repairs must be paid by the tenant in addition to the rent, property taxes, and insurance premiums.

PRACTICE SET-UP

- Identify service providers**
 - Lawyer – Incorporation, review of lease, employment contracts, business partnerships
 - Bank – Business accounts, payroll, POS, personal, investing
 - Accountant/Book Keeper – Taxes, payroll, monthly expenses
 - Insurance Provider – Worksafe BC, liability, personal liability, etc.
- Get Started with BC Business Registry** – a one-stop-shop for setting up a new business
- Register with local organizations:**
 - Clinical Faculty Appointment – through university
 - VIHA – Privileges, credentialing
 - City/Municipality Business License
- Register/update with professional organizations:**
 - College of Physicians & Surgeons of British Columbia
 - Doctors of BC – Practice Tool Kit, New to Practice, Privacy Tool Kit
 - Canadian Medical Association
 - Royal College of Physicians & Surgeons of Canada
 - Canadian Medical Protective Association
 - Pathways – get referrals “from all across BC”. Just send an email letting them know you're a new physician and they'll help get you set up.
 - Any other organizations
- Register with Care Partners**
 - Excelleris
 - VIHA Intranet/PowerChart
 - Lifelabs?
 - Private medical facilities – if applicable
- Notify Billing Partners**
 - Medical Service Plan/Teleplan

- Medavie Blue Cross
 - Set up a user account for all locations you'll be submitting billings i.e. Office & Hospital. This process can take several months to complete.
- EMR provider
- Identify/develop supporting partnerships**
- Other business needs**
 - Business cards, marketing materials etc.
 - Parking Passes – VIHA, etc.

OFFICE SPACE SET-UP

Service Providers

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| <ul style="list-style-type: none"> ○ EMR (Electronic Medical Records) ○ IT Support ○ BC Hydro ○ Telephone provider ○ Internet provider ○ Fax – physical or internet provider ○ Server/back up support | <ul style="list-style-type: none"> ○ Delivery of equipment, stationary i.e. Staples, medical supplies i.e. Stevens, samples ○ Cleaning service ○ Garbage & recycling ○ Security – system or on site ○ Transcription Services ○ Billing Support Service |
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Medical Equipment & Supplies

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| <ul style="list-style-type: none"> ○ Treatment bed(s) ○ Blood pressure cuff(s) ○ Table paper ○ Drapes ○ Gowns | <ul style="list-style-type: none"> ○ Gloves ○ First aid kit ○ AED ○ Etc. |
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Office Equipment

- Computers, printers, scanners, monitors, label makers
- Server and back up
- Dictation handset & software
- Telephones:

<ul style="list-style-type: none"> ▪ Land line vs. VoIP (Voice Over Internet Protocol) ▪ Multi-line ▪ Handsets & headsets ▪ Voicemail 	<ul style="list-style-type: none"> ▪ Call forwarding ▪ Remote calling – ability to call from external line while call display shows you're calling from the office
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Furniture

- Waiting area
 - Chairs, small tables, coat & umbrella racks, brochure racks,
- Treatment room
 - Chairs, gurney, desk, rolling tables/trays, step-stool, rolling stools
- Staff areas
 - Desks, chairs, lunchroom table, etc.
- Storage cabinets
- Window blinds

SCHEDULING & VACATIONS

Building a Daily Schedule

- Consider time to complete letters, review labs, etc., when determining how many patients to see in a day
- Remember to build time into the schedule to hold for urgent patients
- Build in breaks, if necessary
- Remember to take lunch
- Plan regular meetings with your MOA to discuss the practice and stay on track

Vacation & Sabbatical Planning

- Build a template of your schedule to consider time working vs. time off for vacations
- Planning ahead and coordinating with your office staff will be very beneficial in ensuring you get the time off needed and the practice will not be subject to disruptions
- Build in a plan for sabbatical every 5-10 years

OPERATIONS, POLICY & PROCEDURE

Consider the creation of an operations, policy, and procedure manual

- Establish ground rules and basis from which to develop the business
- Outline the vision of the business and build a model of values from which to function
- Consider the possibility that it may take time to find the appropriate support staff (with potential for turnover) and having an operations manual is a fantastic way to ensure a base level of consistency with the practice

HIRING SUPPORT STAFF

Build a team around you to ensure the success of your practice

- MOA
- Research Assistant/Coordinator
- Nurse
- Billing Company
- Transcription Services

Have a clear vision of the type of person you want to work closely with in the practice and ask yourself some questions

- What is your communication style? What style do you best relate with?
- What values are a priority? Shared values are a strong foundation to a good relationship
- Career/life stage – Are you starting out together? Children? Other life priorities

Employment contract & HR

- Review HRCouncil.ca for information on the rights of the employer and employee. Seek a guide on what you can/cannot ask in an interview, hiring/firing, reprimands, etc.
- Review with your lawyer an employment contract to be prepared to take action with the employment process

Employment posting & compensation

- Create a comprehensive employment posting that will describe the duties required of the position, the hours of work per day and week, and the desired qualifications you're seeking in a candidate. Set a start date for the position to help enforce the timeline for application, interview, training, etc.
- Place the employment postings where you'll generate quality responses, such as with reputable colleges that offer MOA programs, as they often post to their alumni as well as current students
- Ensure the employment posting for the position is out at least 2-3 months in advance so you have the flexibility of time to make the right choice

- Consider having an application form to gather consistent information from each candidate, making it easier to review/short-list
- It is not required to include the rate of compensation in the employment posting or if you'll be offering benefits. These topics can be discussed later with the desired candidate. Often a phrase such as, "Compensation commensurate with experience" will be used in the posting.
- When determining the rate of pay, consider the required duties, qualifications, hours of work, and the wage range you're willing to negotiate within for starting with the right employee.
- Benefits can be very important to a potential hire, so be prepared with an idea of the type of benefits you may be willing to provide. Doctors of BC or a private company can provide more information to get you started.

□ **Collecting & Reviewing Resumes**

- Be prepared to receive a large volume of resumes for review
- Set aside the appropriate time to look through what each candidate has provided you
- Have a set of questions/criteria written down to assist you in quickly reviewing and vetting the resumes, such as "Attention to detail" – do they have several spelling or punctuation errors that would be caught with "attention to detail"?
- If you've used a standardized application form and are collecting resumes and cover letters as well, what are the things that truly make the candidate stand out to you?
- Consider varied experience – often a person with a breadth of skills and experience can provide great value. It can also be a warning that they're not able to "stick with it". Look at the employment timeline and don't be afraid to ask about the transitions if it's something you find a concern

□ **Interviewing**

- **Telephone Interview:** These can be conducted to shortlist the people you're considering. Have a prepared list of questions to ask each candidate. View this process as a brief "getting to know you". If you're able to identify "red flags" over the phone, you can save yourself the time of meeting them in person.
- **In Person Interview:** Take your time during the in-person interview. How much can you truly learn about someone who is nervous for the first 15-20 minutes? Have a set of questions that are different from your telephone interview. Use your notes from the telephone interview to dig a bit deeper into what the candidate has already shared.
 - Consider having a colleague and/or an experienced MOA, with a strong sense for how the practice works, sit with you for the in person panel interview so you get a different perspective on the candidates
 - Share some information about yourself to give them the opportunity to choose you as well. Remember, interviews go both ways.
- **Second Interview/Working Interview:** Bring the 1 or 2 top candidates back individually for a second/working interview to see how they function in the space and under your direction. Set up a template of some activities the MOA will have to perform in the role and see how they handle the challenge. This interaction should help you work through communication with the candidate, observe how they adapt on the go, and how they function under pressure (they're going to try to impress you).

□ **Checking references**

- Exercise due diligence in checking references. It's often what is NOT SAID in a reference that can help guide you.
- Has the candidate provided letters of employment vs. letters of reference vs. letters of recommendation? These 3 letters are very different and can reveal a lot about the candidate. Keep in mind that not all places of employment can provide personalized letters to the employee; large

organizations generally can only provide a letter stating the position, duties, and term of employment.

□ **Extending an employment offer**

- Once you've selected your candidate, reach out to them in person to offer the position and state briefly the terms of the employment
- Offer to send an employment contract to the candidate for their review and allow them the space to ask any questions and provide a response
- Request a loose timeline for response – after all, you have a business to start running
- Once the position is accepted by the candidate, ensure you get the signed contract formally accepting the position before you tell the other candidate(s) they did not get the position.
- If you have a welcome package outlining some of the basics of the office and practice, it can be very helpful to have the new hire read through prior to their first day. This will help with the training process and gives the new hire a sense of knowledge and capacity right from the get-go

□ **Orientation & training**

- Be prepared to welcome the new hire on their first day; provide a basic orientation to the office and their workspace
- Provide any keys or parking passes required so they can successfully access the office
- Show them where they can store their belongings, lunch, and where the washroom is located
- Get them set up with their security passwords and/or log in IDs to obtain access to the computer system, etc.
- If you're able to have a welcome package or training manual prepared, this will be a fantastic resource. Consider basics such as parking, building hours, who to contact for the various needs of the office; an overview of some of the stakeholders, language used, and even preferences for operations.
- A comprehensive training manual can help to save extensive hours of training and can help to ensure “best practices” are followed right from the beginning.
- If you're hiring for the first time and/or it is not an option to have the existing MOA provide training to the new hire, seek out an experienced MOA or two in the field to assist with training

Hiring Tips

Consider the damage a bad hire could cause to your practice:

- How involved/aware are you of the day-to-day functions?
- How long will it take to fully realize things are not working?
- What is the extent of the “damage” and can you recover?

Use Caution if using a Temp agency:

- Is this a person between roles due to circumstance (employer retired, or they're returning to the work force after children) or
- Is this a person who's been doing temp work for an extended time because no one will hire them

Reach out to the community & your network:

- Ask around to other doctors who may know of an MOA coming available
 - Ask other MOAs if they know of a quality candidate seeking employment
 - Are there names of MOAs that are on the “black list” that you could be warned about before going through the hiring process? Remember to take this with a grain of salt and ask questions.
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HEALTH & SELF CARE

- Build self-care into the practice right from the start to ensure optimum health and stability to provide care to others
- Prioritize your nutrition, fitness/exercise routine, and ways to stress manage techniques such as massage, meditation, hobbies, etc.
- Personal health services & plans**
 - Health insurance
 - Accidental death & dismemberment insurance
 - Short-term & long-term disability insurance
 - Health Spending Account
 - General Practitioner
 - Dentist
- For specific recommendations see the Victoria Physicians Wellness Group on Facebook

EMERGENCY PREPAREDNESS

- Ensure your office has a designated first aid attendant at all times and this his/her training is up to date**
- Develop office emergency plan & review and practice it with all staff annually**
 - Visit <https://www2.gov.bc.ca/gov/content/safety/emergency-preparedness-response-recovery/preparedbc/small-business-preparedness> for more information and a template for creating your own emergency plan