

Dental Practice Startup Checklist

This checklist is provided for general informational purposes only and does not constitute legal, financial, tax, or professional advice. Requirements vary by state and individual circumstances. Consult a licensed dental attorney, CPA, and your state dental board before making any business or legal decisions.

	WHO	WHEN	DATE COMPLETED	NOTES
Advisory Team				
Select Dental CPA.				
Select Dental Attorney.				
Select Dental Insurance Credentialer.				
Select Dental Real Estate Advisor.				
Legal				
1. Entity Formation & Registrations				
Decide on a business structure – LLC/PLLC/PC.				
Decide on a tax structure – Sole Proprietor/S-Corp/Partnership (in most states the owner must be a licensed dentist.)				S-Corp recommended in most states if 1 owner
File for an EIN with the IRS.				
Make an S corporation election – if 100% owned by one dentist, consult with your CPA. State election requirements and taxation vary.				
Establish and document reasonable W-2 compensation for shareholder-employee (IRS audit focus area).				
Obtain local business license from city or county.				
Open state payroll tax accounts – income, unemployment, etc.				
Open sales tax account with state if selling taxable items.				
Obtain Worker's Compensation policy.				
Obtain professional liability (malpractice) insurance.				
Obtain general liability and property insurance.				
2. Licensing & Compliance				
Obtain or verify state dental license under new entity.				
Obtain DEA registration if prescribing controlled substances.				

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Register with state dental board.				
Confirm zoning and compliance with local ordinances.				
Ensure facility meets OSHA and infection control requirements.				
3. Contracts & Agreements				
Execute office lease or real estate purchase contract.				
Draft employment or independent contractor agreements for staff.				
Review and sign vendor and supplier contracts.				
Financial				
1. Financing				
Secure startup funding through dental-specific lenders.				
Determine total startup costs and initial working capital needs.				
Prepare cash flow projections for Year 1–3.				
Prepare income tax projection.				
Open a bank account under the business name.				
Open a credit card or dedicate one for business expenses.				
2. Financial & Tax Planning				
Create a startup budget (equipment, build-out, supplies, marketing).				
Establish a UCR fee schedule for all services.				
Set owner and staff wages.				
Contract for benefits, health insurance.				
Discuss retirement plans (SEP, Simple IRA, 401k, Cash Balance Plan) with a CPA.				
Discuss equipment and building depreciation options with a CPA.				
Consider personal disability insurance.				
3. Payroll Setup:				
Select Payroll Processor (we work with Gusto – see us for pricing).				

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Request Form W-9 from subcontractors that you pay.				
4. QuickBooks				
Obtain wholesale priced subscription from your CPA.				
Select qualified bookkeeper (CPA usually offer this service).				
Setup a dental chart of accounts for the Balance Sheet and Profit & Loss.				
Operational				
1. Facility & Build-Out				
Select and secure office location (lease or purchase).				
Complete dental office design and build-out.				
Ensure ADA accessibility compliance.				
Install necessary plumbing, electrical, and ventilation for dental use.				
2. Equipment & Supplies				
Purchase and install dental chairs, units, and cabinetry.				
Purchase and install digital X-ray and imaging equipment.				
Purchase sterilization equipment (autoclave, ultrasonic, etc.)				
Stock initial inventory of dental materials and supplies.				
Test and certify all equipment before opening.				
3. Technology Setup				
Select and install practice management software (Dentrix, Eaglesoft, etc.)				
Set up digital imaging software and integrate with practice management.				
Set up secure, HIPAA-compliant patient communication system.				
Create and launch practice website and Google Business profile.				
Set up business email and domain.				
4. Staffing				
Hire front office staff, dental assistants, and hygienists as needed.				

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Complete new hire onboarding and required training.				
Establish staff schedules and operational workflows.				
Administrative				
1. Insurance & Billing				
Complete credentialing with dental insurance providers.				
Set up electronic claims submission.				
Set up accounts with credit card processors.				
Establish patient billing and collections procedures.				
2. Patient Acquisition & Communication				
Develop a marketing plan and patient acquisition strategy.				
Create new patient welcome materials and intake forms (HIPAA compliant).				
Set up patient recall and appointment reminder system.				
Launch social media presence and online reviews strategy.				
3. Compliance & Policies				
Create OSHA exposure control and hazard communication plans.				
Create HIPAA privacy and security policies.				
Establish patient records and retention policies.				
Marketing				
1. Demographic & Market Research				
Obtain a demographic study of the target area (age, income, population density). We can help you obtain a free, comprehensive study.				
Analyze local competition – number of dentists, specialties, and market saturation.				
Identify underserved patient segments (pediatric, senior, bilingual, etc.)				
Assess insurance mix in the area (PPO vs. Medicaid vs. fee-for-service).				
Define your target patient profile and ideal service mix.				

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2. Branding & Identity				
Choose a practice name and confirm availability (domain, state LLC, trademarks).				
Design logo and establish brand colors, fonts, and voice.				
Create brand standards guide for consistent use across all materials.				
3. Digital Presence				
Build and launch a professional, mobile-friendly practice website.				
Set up and optimize Google Business Profile.				
Claim and optimize Yelp, Healthgrades, Zocdoc, and other dental directories.				
Set up social media accounts (Facebook, Instagram) and post before opening.				
Implement basic SEO (local keywords, meta tags, Google Maps listing).				
4. Pre-Opening & Launch Marketing				
Send direct mail campaign to households within 3–5 mile radius.				
Place signage at office location prior to opening.				
Run targeted Google Ads and/or Facebook Ads for new patient acquisition.				
Introduce the practice to neighboring businesses and referral sources.				
Plan a grand opening event or new patient special offer.				
5. Ongoing Patient Growth				
Set up an online review request workflow (Google, Yelp).				
Establish a patient referral program.				
Set up email marketing for patient recall and promotions.				
Track new patient sources monthly and adjust marketing spend accordingly.				

Please reach out if you'd like more detail or help on any specific area!