

## STARTUP TOPICS

What do you want out of your Direct Care practice? What tools do you need to create your ideal clinic?

The answers could lie right in front of you – so read up. Learn everything you can.

Then ask all the questions you can think of.

### Topics

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### Stuck? Let us help.

So whether you're transitioning from a traditional practice or starting from scratch, you probably have some questions. We're here to help you and we don't believe you should have to pay for doing your homework. That's why we offer all our consulting (and everything that comes with it) for free. Zero cost to you. After all, you're already doing the work of starting your DPC practice – you shouldn't be penalized for doing it right. Reach out to us anytime.

**Kirk Umbehr**

**Email:** [kirk@atlas.md](mailto:kirk@atlas.md)

**Cell:** (785) 317 4717

**Jared Umbehr**

**Email:** [jared@atlas.md](mailto:jared@atlas.md)

**Cell:** (228) 213 0038

Direct Primary Care is transforming healthcare into a simpler and more accessible model. It's increasing the availability of doctors and physicians and ensuring that patients are being seen for longer with each visit. It's helping doctors help patients, which is why they got into the game in the first place.

But while DPC is about simplicity, starting a clinic is a laundry list of hurdles and challenges. This is why we've created this guide, to help navigate those tasks and provide as much information as possible for launching a successful DPC practice from the ground up.

#### To-dos

- ☐ Selecting a Name and Establishing your Identity
- ☐ Purchasing a Website Domain
- ☐ Setting up a Twitter Profile
- ☐ Setting up a Facebook Profile



## 01 Creating A DPC Clinic

### Selecting a Name and Establishing your Identity

**The first step for establishing a DPC clinic is to select a name.** It's important to choose a name that is easy to remember but also gives patients an idea of what to expect from your practice.

A good tool in this regard is Namechk. It allows you to search for your desired name across most social media channels and domain extensions, and lets you know what's available.

To get started, go to <https://namechk.com/> and type in the name you'd like to give your website. Namechk will then give you a list of which domains and usernames are available.

☐ Mark this done! ☐ Not Applicable

### Purchasing a Website Domain

**Once you've decided on a name, the next step is to purchase the website domain.** While there are a host of options out there, many of them offer very similar services in terms of quality and cost.

Google is always a good choice, especially if you use Gmail and G-suite software for your day-to-day administrative tasks.

<https://domains.google/#/>

GoDaddy is a well-known web hosting company that can be used with any email service. They also feature a website builder if you'd like to DIY your own website.

<https://www.godaddy.com/>

Enom is similar to GoDaddy, offering web hosting services, a DIY website builder as well as an e-mail builder.

<https://www.enom.com/>

MaxMD is more expensive but offers a unique MD domain that identifies you as a medical practitioner immediately. The domain costs \$150:

<https://www.max.md/>

Once you own your web domain, you can change your email to reflect your domain name for a more professional look.

E.g: [doctor@yourclinicname.com](mailto:doctor@yourclinicname.com) and [nurse@yourclinicname.com](mailto:nurse@yourclinicname.com)

☐ Mark this done! ☐ Not Applicable

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## Setting up a Twitter Profile

**Once you've purchased your website domain, the next step is to set up your social media presence, beginning with Twitter.**

Twitter is a great platform for connecting with your patients, other doctors and practices, and for updating the public about what's happening within your own DPC.

The first step is to visit [twitter.com](https://twitter.com) and create a profile. When selecting your profile picture, opt for either a doctor within your DPC or an easily identifiable logo of your practice. With regard to the header photo, a high-resolution photo of your practice should work well.

Fill out the rest of the relevant details such as your location and the name of your website in order to help patients contact you more easily.

You won't have any followers at this point, so it's a good idea to start following other DPC clinics. You can often glean a lot from successful posters, so following peers in your field is a great way of harnessing some free, quality information to help establish your own profile.

☐ Mark this done! ☐ Not Applicable

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## Setting up a Facebook Profile

**Facebook is another powerful resource for building your brand and establishing your identity.**

To start, visit Facebook.com and create a business or brand profile.

Add the details of your practice including the name, address and contact information.

Update your profile picture with a professional photo of a doctor within your DPC or your logo, as well as the cover photo with a picture of your practice.

Next, claim your vanity facebook.com URL and change it to match your clinic's by going to:

**[www.facebook.com/username](http://www.facebook.com/username)**

Once you've completed this your page is ready to launch. In order to build a following, you'll have to create content that is entertaining, informative or educational. This content could be about the practice itself, anything medical- or industry-related, or ways money-saving medical tips for patients; get as creative as you like.

If you're unsure where to start, follow other DPC clinics such as **Command Family Medicine** and **Green Hills Direct Family Care**.

When you do start gaining a following, remember to respond to any and all queries, both positive and negative, that get posted on your feed. Since Facebook is a public platform, everyone will be able to see what you choose to reply to or not, and so the way in which you respond can have a fairly large impact on your clinic's reputation.

☐ Mark this done! ☐ Not Applicable

## To-dos

- ☐ Hire a Lawyer
- ☐ Hire an Accountant



02

## Legal and Financial Concerns

## Hire a Lawyer

**Once you've taken care of your basic groundwork, the next step to establishing a DPC clinic is to hire a business lawyer that will help lead you through the sometimes complicated corridors of DPC administration.**

While starting any sort of health institution will require some formal legalities, DPC physicians require certain legal items that other groups of physicians don't, including:

- DPC Standard Patient Agreements
- DPC Medicare (Opt-Out) Patient Agreements
- Filing Opt-Out Documentation with appropriate Medicare Carriers
- Advertisement / Website Reviews
- In-office Dispensing Considerations

And so, in this case, it helps to have a lawyer on hand who specializes in DPC legislation. We can recommend Luanne Leeds. You can find her website here:

<https://www.leedslaw.us/>

Her practice specializes in the establishment of DPC clinics as well as any other related legal issues or requirements. You'll need her to help you with a number of things, including:

- Creating a business entity
- A patient agreement
- A Medicare opt-out waiver

Another great resource for any legal DPC queries can be found on [www.dpcfrontier.com](http://www.dpcfrontier.com). Dedicating to growing the DPC movement, the DPC Frontier is invaluable for all things legal and DPC related. It's especially helpful if you just need some quick counseling or a couple of

questions answered, as their services and information are available free of charge.

For free legal work such as contract reviews, we also recommend getting in contact with Keen Umbehr:

**Email:** [keen@atlas.md](mailto:keen@atlas.md)

☐ Mark this done! ☐ Not Applicable

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## Hire an Accountant

**After a lawyer, hiring an accountant is the next important step to legitimizing your DPC clinic.**

As a doctor, bookkeeping, payrolls, taxes, and any other financial considerations are likely to be your last concern when it comes to starting a clinic and helping patients. In fact, during the initial phases of your establishment, fiscal matters are likely to only add stress to the entire process. That's why it makes sense to outsource your accounting requirements to a professional.

It will also help your clinic to be financially responsible from the start. While the initial start-up costs may be a little high considering that the accounting needs of your clinic within the first few months won't be too complex, the good news is that all of it is tax-deductible, so whatever you spend now will offset your income tax at a later date. This makes it a good idea to establish your accounting framework now, so you don't have to worry about any potential complications later.

If you're financially-savvy and understand how to do your own bookkeeping, payroll, and taxes, and are willing to shoulder this burden on top of the other tasks at hand, consider investing in accounting software such as QuickBooks, Freshbooks, and Xero.

If, however, you're unsure how to chart the uncertain waters of accountancy, we can recommend Reid Hash. He is an expert when it comes to tax planning and tax preparation, and will be invaluable when it comes to establishing a financial plan for your clinic. Get in touch with him using the following details:

**Tel:** 785-272-4484

**Email:** [r.hash@sccpas.com](mailto:r.hash@sccpas.com)

Depending on the needs of your clinic, you can expect to pay anywhere between \$100 – \$500 for accounting services.

☐ Mark this done! ☐ Not Applicable

Your website and logo are two incredibly important aspects for not only establishing a DPC clinic but any business. They're the first point of contact between you and potential patients, and the impact they make will go a long way to determining whether or not patients choose your practice.

A good website has to look professional, be intuitive and easy to navigate and provide any information and details that patients may require to get in contact with you for further consultation.

A good logo should be attractive, distinctive, and simple. Its function is to relay meaning and communicate an intended message about your practice. It should conceptualize your practice, stand out among others in the same field and be easily recognizable to whoever sees it.

Logos are tricky things to create; it's advisable to contact a graphic designer rather than do it yourself. Since it's going to be part of the face of your clinic, it needs to be professional and svelte. Alternatively, many website design studios also offer this service as part of their web design packages(see below).

When it comes down to designing both a website, you have a number of options at your disposal.

#### To-dos

- ☐ Do it yourself
- ☐ Hire a professional



03

## Website and Logo Design

### Do it yourself

**If you're someone who's relatively tech-savvy, then designing your own website and logo might be a fun and worthwhile challenge.** There are a number of companies that make the process fairly straightforward. All you need is a basic eye for detail and the ability to follow a tutorial or two if you get stuck at some point during the design process.

<https://www.squarespace.com/>

<https://www.wix.com/>

<https://www.godaddy.com/websites/website-builder>

Squarespace, Wix, and GoDaddy are just three examples of website builders that are designed to help people design their own website. They offer a number of different templates and prepacked elements which can be arranged to build a professional-looking and fairly functional website. If you're not happy with those choices, simply Google "website builder" and you'll be presented with dozens of more companies offering the same service.

## Website layout

If you opt for the DIY route, you'll have to design your own website layout. There are a number of pages common to most websites which yours should include as well. These pages include:

- Home
- About Us
- Our Team
- Benefits
- Our Fees
- FAQ
- Join
- Contact us

If you're stuck for ideas and want a general feel of what should be on your website, take a look at the site any other well-established DPC clinic and see what makes it great. Include these aspects on your own website while taking care to develop your own voice and brand which differentiates you from other clinics on the market.

You will also want to include your privacy policy, as well as links to all of the social media accounts you set up earlier.

**See Sample PDF: Notice of Privacy Policies**

☐ Mark this done!    ☐ Not Applicable

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## Hire a professional

**Building a basic website by yourself is certainly cheaper, but you're losing out of additional expertise.** Hiring a professional website designer is advised if you want something high-quality and hard-hitting, or if you just want to save time. Since most people use the internet in order to connect them with goods or services, the importance of a good website can't be overstated, and in most cases is definitely worth paying for.

A professional website design studio will work with you every step of the way to ensure that your website is attractive and functional in every aspect. They will also help you develop the content of



the site itself, and ensure that your website encapsulates your clinic's message and mission.

Based on web designers that we've worked within the past, we can recommend Entermotion (slightly more expensive but their work is of higher quality) and PeachyHillCreative (more affordable). Check out their websites below:

<https://entermotion.com/>

<https://www.peachyhillcreative.com/>

☐ Mark this done!    ☐ Not Applicable

As the entire DPC movement hinges on moving away from third-party insurers, this next step is quite an important one.

Before you can start charging patients for your services, you're going to have to cancel any existing health insurance plans you currently have. This is in order to prevent a DPC clinic from collecting cash from a patient and then claiming reimbursement from their insurance company, thus scoring a double payment.

On top of this, you will also have to decide whether or not you want to opt-out of Medicare (more on this in the next section). Opting out means you will be able to bill your patient directly rather than seeking reimbursement from Medicare after each visit and procedure.

#### To-dos

- ☐ Contact your insurance directly
- ☐ Insurance specialists



04

## Cancel All Insurance Plans

### Contact your insurance directly

**If you're unsure how to cancel your insurance, don't be afraid to call the insurance company directly.** Be sincere and to the point and ask how to cancel your contract and where to send a cancellation letter for official documentation.

It's important that you plan this in advance, as standard notice time for insurance policy cancellations is usually a 60, 90 or 120-day period. All insurance companies have different policies in this regard but you can find the exact figure in your contract. The further you proceed with your DPC clinic, the harder it will be to become unentangled in an insurance contract, especially if you've already started to move forward with monetary investments such as signing the lease on a clinic space.

If you work for a hospital, your insurance contract will be set up through your employer, and so will terminate when your employment with the hospital ends. You'll still have to opt-out of Medicare in this situation, however.

You should also advise your current patients that you intend to cancel your insurance, and notify them with at least one or two letters to ensure that they receive the information.

☐ Mark this done! ☐ Not Applicable

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## Insurance specialists

**If you need any advice in this arena, get in touch with our insurance specialist for small businesses, Joe Martin, and his associate Mike Morris:**

**Tel:** 316.259.8710

**Email:** wjmartin230@outlook.com

☐ Mark this done! ☐ Not Applicable

As we mentioned during the previous step, while canceling your insurance contracts you'll have to decide whether to stay with Medicare or if you'd like to opt-out of it altogether. There are merits to both options, but ultimately opting-out of Medicare completely and being financially buoyant should be your end goal.

#### To-dos

- ☐ Staying with Medicare
- ☐ Opting out of Medicare



05

## Decide to Stay With or Opt-out of Medicare

### Staying with Medicare

**Staying with Medicare means you won't be able to bill patients directly.** While you'll still be able to see and treat patients with Medicare, you won't be able to charge them a monthly membership, and instead will have to claim back from Medicare for every treatment and patient visit.

While this is fairly tedious in regards to collecting payments, it will allow you to see a broader number of patients and ensure you have enough revenue until you're confident enough to finance your clinic based on DPC visits alone. So some may find it beneficial to maintain Medicare status at least until their clinic has a dedicated body of DPC patients.

☐ Mark this done!      ☐ Not Applicable

### Opting out of Medicare

**Opting out of Medicare means you will be able to charge patients a DPC membership fee and eschew a significant amount of administration in order to collect payments.** You will also be able to maintain your ordering and prescribing status through Pecos.

The first step to opting-out is to copy the opt-out letter from the following address:

<http://aapsonline.org/opting-out-of-medicare-a-guide-for-physicians/>

## Decide to Stay With or Opt-out of Medicare: Opting out of Medicare *cont.*

You'll need to send your signed opt-out form at least 30 days before the "first day of the next calendar quarter showing the effective date of the calendar quarter."

For example:

For a 01/01/2019 opt-out, send your letters at least by 12/01/2019

For a 04/01/2019 opt-out, send your letters at least by 03/01/2019

Next, notify all of your patients that you plan to opt-out of Medicare. Make sure you do this more than once to ensure that every last patient is aware; the more times you make the announcement the better.

After your patients have been notified, copy the Medicare patient form from the following address:

<http://aapsonline.org/opting-out-of-medicare-a-guide-for-physicians/>

When patients join your clinic, have them sign this form in order to document that they both understand that you as a practice have opted out of Medicare, and they can't submit their bill to Medicare in order to claim reimbursement.

☐ Mark this done!      ☐ Not Applicable

If you've decided to make the jump to DPC by converting your existing practice then your current list of patients is going to be one of the very best sources to recruit new patients from. Rather than struggling to attract new patients from the outset, this method allows you to build a reliable client base while also maintaining the relationships of your current list of patients.

#### To-dos

- ☐ Incentivize patients
- ☐ Inform your staff
- ☐ Notify existing patients



06

## Convert Patients From Your Current Practice

### Incentivize patients

**There are a number of incentives that you can offer new and existing patients to stay with you through the transition.**

- Consider offering a discount for patients who enroll early to your DPC clinic.
- Canvas town halls and attend local meetings – take advantage of anywhere that offers you a platform and a chance to speak to local residents to share details about your clinic and how it can help the community.
- Demonstrate to patients in a practical way the money they will save by signing up your DPC clinic. See the attached flyer by Dr. Madsen that compares costs between standard insurance with his Direct Care clinic.

**See Sample PDF: Comparing Costs: Madsen Medical Flyer**

☐ Mark this done! ☐ Not Applicable

### Inform your staff

**It's important to also educate and train your staff, as their feelings and knowledge about direct primary care will ultimately affect the message your patients receive.**

While transitioning to DPC is beneficial to both doctors and patients, it's understandable that not all patients will be happy with the change. It's therefore important that you train your staff in order to have these tough and empathic conversations with patients who won't be completely on board with the transition.

☐ Mark this done! ☐ Not Applicable

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## Notify existing patients

**Determine the notice period that would like to give your existing patients.** It's generally a good idea to provide ample notice and to send out multiple letters reminding them of your impending conversion. You should schedule these letters to send every four weeks for up to 12 weeks.

Keep the letters short – no more than a page. If you have any doubts about how to address these letters, speak to other doctors who have maintained their patient relationships through the transition to DPC. Take a look at the attached sample letter for additional inspiration.

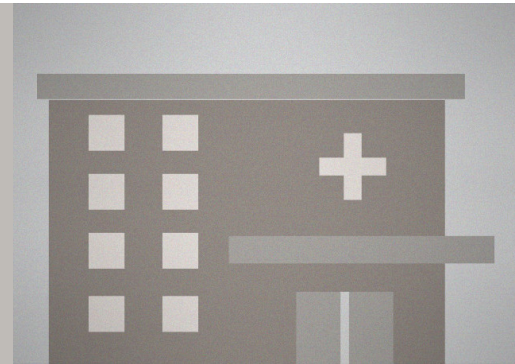
**See Sample PDF: Recruiting From An Existing Practice: 1st Letter**

☐ Mark this done! ☐ Not Applicable

Deciding on the physical location for your clinic and offices is one of the most important factors during your overall establishment. It will affect both your profit margins as well as the ability to acquire new patients, so it's important you give yourself a lot of time to find the ideal location.

#### To-dos

- ☐ Rent, lease, or buy
- ☐ Remodeling



07

## Choosing a Location

### Rent, lease, or buy

**Before you begin looking for a suitable establishment, you should first consider whether you want to rent, lease or buy the property in question.** Each option has both strengths and weaknesses which will be dictated by the overall business plan of your clinic.

If you do decide to lease or rent, think about the period you'd like to lease or rent for – three, six or nine months, for example. Keep in mind that this location doesn't have to be your permanent home, so consider if a shorter lease if you think you may end up moving in the future.

Since monthly payments on a space end up being one of the biggest expenses for any clinic, consider sharing the space with other professionals. Contact other doctors, the medical society and medical realtors and put the word out that you're looking for others to share your space.

☐ Mark this done! ☐ Not Applicable

### Remodeling

**Not all spaces are created equal and some may require more attention than others.**

Refurbishing spaces to suit your needs can quickly become a massive expense. Before you do anything it's important to keep in mind that patients are coming to see you rather than a curated design space. This doesn't mean you can't spruce the place up a little, but you don't have to hire



an interior designer to do it.

Small touches will go a long way without breaking your budget. A few coats of fresh paint or a new carpet will do wonders for the entire space. Speak to the landlord before you start any improvements; they might be able to take care of them for you or offer you a rebate if you pay for them yourself.

Once you've secured your space, add yourself to the maps of the following websites for greater location visibility:

<http://www.iamdirectcare.com/>

<http://www.iwantdirectcare.com/>

☐ Mark this done!      ☐ Not Applicable

Deciding exactly how many staff you need and what types of positions you need to be filled for your clinic is going to be your single biggest expense. It is, however, extremely necessary. The staff you employ will determine the efficacy of the clinic and elevate (or lower) its status in relation to similar enterprises. A team of competent and conscientious employees both greatly increases the standard of care provided and contributes directly to patient retention.

In today's healthcare world, it's quite common that employees wear many different hats within the same clinic. Therefore when searching for employees it's always beneficial if they can offer additional skills in relation to their primary healthcare function such as marketing or social media management.

#### Positions worth considering for your DPC:

- ☐ Medical Assistant – \$33k/yr.
- ☐ Licensed Practical Nurse – \$45k/yr.
- ☐ Registered Nurse – \$60k/yr.



08

### Staffing your Clinic

## Medical Assistant – \$33k/yr.

**MA**s do much of the administrative work within hospitals, private offices, and clinics. This includes answering phones, greeting patients, updating patient medical records, handling correspondence, filling out insurance forms and assisting the physician with a host of other tasks. They're indispensable when it comes to the running of an efficient and busy clinic. They handle many of the day-to-day responsibilities of the clinic, leaving the physician with more time to provide more thorough care to patients.

☐ Mark this done! ☐ Not Applicable

## Licensed Practical Nurse – \$45k/yr.

**LPNs** work under the guidance of a registered physician or nurse to ensure that patients are cared for and comfortable. They perform a range of basic medical duties such as monitoring blood pressure and other vital signs to inserting catheters and helping patients bathe and dress.

They're responsible for communicating directly with patients and discussing their healthcare requirements, and so a high degree of interpersonal skills is needed. They also aid the physician or nurse in charge by reporting on the health status of patients.

☐ Mark this done!      ☐ Not Applicable

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## Registered Nurse – \$60k/yr.

**RNs are typically the most valuable members of staff – but also the most expensive.** To become a registered nurse usually requires between three to four years of studying, meaning they're highly educated and equipped to meet the daily challenges of DPC work. Their main duties involve administering medication and providing treatment to patients, performing tests and scrutinizing results, advising patients how to treat illnesses following treatment and overseeing other staff such as LPNs and MAs. They work very closely with the physician in charge, often assisting with exams and surgeries, and are overall an invaluable addition to the team.

☐ Mark this done!      ☐ Not Applicable

This might seem counterintuitive, but when thinking about pricing, forget about the price. At first. There are a number of different questions you need to ask and answer before you can settle on a feasible monthly membership fee. What is your definition of success? What is your goal salary? How many hours do you want to work? How many staff will your clinic employ? Do you want to grow fast, or slowly? What does your ideal patient look like, and what is the maximum number that you can accommodate?

#### To-dos:

- ☐ Review pricing strategies
- ☐ Commonly used pricing structures



09

## Pricing

### Review pricing strategies

**The truth is you can copy another clinic's pricing strategy, but until you answer these questions you won't have a pricing solution tailored to your specific needs.** A general starting equation might look something like: (ideal salary) + (estimated overhead) + (20-30% wiggle room) = Total \$ per year / 12 months = total per month / ideal patient panel size = avg \$ per patient.

If you're a solo, part-time doctor operating a small practice with no staff, the equation, when filled in, might look like: 120k + 30k + 30K = 180k / 12 = 15,000/mo / 300 = \$50 average.

But for a doctor running a clinic with multiple staff, geared towards high growth with a focus on pediatrics, this equation would look like something else entirely, and the final amount would correspond to those differences.

The above equation gets you to the minimum sustainable pricing needed to run your clinic and is effective for most doctors to grow and achieve a decent salary after a year or two of practicing. If you'd like to earn more, faster, then the next step in the pricing process is to take into account your personal financial risk tolerance. Are you willing to risk charging higher membership fees at the expense of slower growth? Can you provide the necessary value to justify higher membership fees? These are the questions you have to consider, but know that lower fees offer more guarantee of patient enrollment and less risk of establishing an unsuccessful clinic.

And speaking of value, now's the time to address it. Your price should reflect the value that your clinic offers. What value are you bringing to your membership fee? \$10 per month for healthy kids vs \$50 for specialized autism care? Unlimited visits with no copays? Or limited visits with copays? Wholesale meds? Wholesale labs? Free procedures? Every one of these needs to be factored in when determining your pricing structure. You also have to take into account the proliferation of Direct Care clinics and the competition that this presents. Increasingly there are more Direct Care practices in every city for patients to choose from. So you might be able to charge more and do less in some locations for a while, but the risk is great.

☐ Mark this done! ☐ Not Applicable

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## Commonly used pricing structures

**When it comes to membership fees, every DPC clinic has slight variations within its own pricing structure.** There are a few different variables to consider. Choose from a flat rate, couple or family plans, annual discounts, age tiers or some combination of the above. That being said, there are commonly used pricing structures that many clinics adhere to, which we'll discuss in more detail below.

When it comes to an enrollment fee, it's generally advised to keep it low or get rid of it altogether in order to encourage more patients to sign up.

If you're partnering with a company, offering a corporate discount is a great way of attracting large numbers of new patients. \$50 per employee is generally a good starting point.

Many clinics also adjust their monthly fees according to different age tiers, with younger members paying less. The tiers usually look something like this:

Age 0-19 \$10/mo.

Age 20-44 \$50/mo.

Age 45-64 \$75/mo.

Age 65+ \$100/mo.

You should also consider your re-enrollment process. Some doctors refuse patients who have unenrolled or missed payments. Others charge back-payments on all membership fees missed during the times when patients weren't enrolled. Others charge a re-enrollment fee. If you decide on the latter route then ensure that it's at least twice the price of your monthly fee to prevent people from continually unenrolling and then re-enrolling.

☐ Mark this done! ☐ Not Applicable

One of the joys of running a DPC clinic is being able to buy medicine at close to cost and pass those savings on to your patients. It's one of the easiest ways to add substantial value to your patients' membership, and also provide another level of convenience to your patients' visits by cutting out an additional visit to a pharmacist.

#### To-dos:

- ☐ Check if you qualify in your state
- ☐ Set up an account with AndaMED
- ☐ Set up Amazon business account



10

## Purchasing of Medication

### Check if you qualify in your state

**The first step to being able to legally dispense medication from your practice is to check if you qualify in your state.** There are currently 44 states that allow physicians to dispense medications inhouse to their patients with little to no additional paperwork, so it's prudent to ensure that your practice meets all the requirements. Check to see if you qualify here:

<http://www.scriptmedps.com/dispensing-by-state.php>

On top of that, make sure that your state does not require you to add sales tax for over the counter medication, medical supplies or any durable medical equipment ( DME) you may sell from your dispensary:

<https://www.salestaxsupport.com/blogs/industry/medical-industry-tax/which-states-tax-prescription-and-over-the-counter-medicine/>

☐ Mark this done! ☐ Not Applicable

### Set up an account with AndaMED

**Next, set up an account with AndaMEDS.** They're one of the biggest providers of medicine to independent physician practices, medical groups, and DPC clinics, and they're going to be your

primary supplier. Get in touch with Tamara on the following email address to help facilitate the process:

**[tamara.forbes@andameds.com](mailto:tamara.forbes@andameds.com)**

AndaMEDS will provide you with medications, bottles, lids, and many other medical supplies, but they won't be able to give you everything you need. You can find all of the other miscellaneous medical paraphernalia such as bottle labels of a Dymo printer on Amazon.

**See Forms:**

**[Account-Set-Up-AndaMeds.pdf](#)**

**[Purchasing-Group-AndaMeds.pdf](#)**

**[New-Customer-Form-AndaMeds.pdf](#)**

☐ Mark this done! ☐ Not Applicable

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## Set up Amazon business account

**You'll need to set up an Amazon Business account.** It's pretty simple – about as difficult as setting up an ordinary account – but it comes with a host of benefits. Business account customers can enjoy business pricing, bulk discounts and sometimes even certain tax-exemption benefits.

If you're unsure about what specific medications, bottles, labels, etc you need to purchase, email Kirk and he will provide you with any additional information you need:

**[kirk@atlas.md](mailto:kirk@atlas.md)**

☐ Mark this done! ☐ Not Applicable

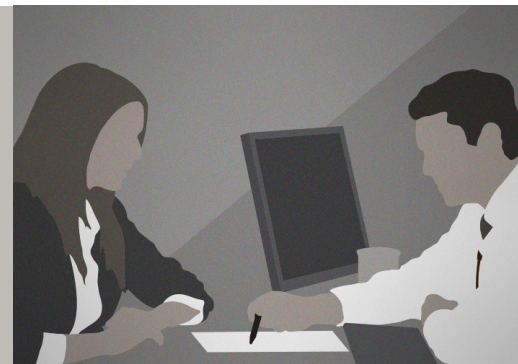
Next to medications, offering affordable lab testing is another way of increasing the value of patient memberships while also adding another notch to the belt of your clinic's versatility. It means your patients will have access to affordable lab work carried out quickly and provided with minimal extra cost to them.

To start, contact labs such as Quest, Mercy or LabCorp and open up a new account with "client bill rates" for all labs. This ensures that the clinic and physician (instead of the patient) will be billed by the lab directly and that these savings can then be passed on to the patient.

The labs will provide you with all the supplies you need, like tubes, tourniquets, and needles, in order to gather samples and specimens such as blood or urine, at no cost. This saves both time and money by incentivizing physicians to draw samples at their clinics and send them to the labs, rather than sending patients to a lab itself.

#### To-dos:

- ☐ Check if you qualify in your state
- ☐ Set up an account with AndaMED
- ☐ Set up Amazon business account



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## Labs

### Pricing

**Pricing for lab work is often the cost of the tests + 10% billed to the patient.** It's a good idea to never agree to discounts offered by labs based on volume. The reason being that a clinic's volume will change every single month. Under such an agreement, labs will have no problem changing their pricing if you're not sending through enough monthly orders. By not agreeing to a certain volume each month, the labs' pricing will stay consistent and you won't have to worry about any sudden price fluctuations.

You can see the full list of labs pricing here:

[See Sample PDF: Labs and Medication Pricing](#)

☐ Mark this done! ☐ Not Applicable



## Plan ahead

**It's important to note that setting up an account with a lab can take a couple of months, so it's advised to do it sooner rather than later.** That way you can start to offer these services as soon as possible after opening your clinic.

**See Sample PDF: Client Special Price Quote**

☐ Mark this done!      ☐ Not Applicable

Imagery and pathology follow much the same course as labs. Both services increase the value of your patient membership by allowing patients to enjoy greatly discounted rates on otherwise costly procedures. Having them as part of your membership package also adds to the versatility of your clinic as a whole, so it's always good to offer them if possible.

To-dos:

- ☐ Imaging
- ☐ Pathology



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## Imaging and Pathology

### Imaging

**When sourcing medical imaging services, contact local imaging centers and request a cash list of all of their offered services.** Also, enquire if billing your clinic directly is possible – this way you can pay for the services at cost, and then pass those savings on to your patients. As long as they don't go below Medicare rates, these imaging centers can also accept cash directly from patients.

With regards to pricing, you should be paying in the neighborhood of the following imaging services:

X-ray: \$20 – \$40

Ultrasound: \$100

MRI: \$400

When billing your patients, charge them the above cost plus 5 %.

If the imaging clinics have questions, we can easily put them in contact with our radiology groups.

Just as with labs, never agree to discounts based on volume to ensure the prices offered to you stay consistent.

[See Sample PDF: Imaging Master Fee Schedule](#)

☐ Mark this done!

☐ Not Applicable

## Pathology

**When offering pathology services, a good pricing benchmark is to charge patients the cost price with a 10% mark up.** Some states have anti-markup laws when it comes to pathology, however, so it's a good idea to doublecheck before you set any prices in stone. You can see the list of states with differing billing laws [here](#). Some states also require that by law that you must disclose the actual cost of services charged by the pathology clinic, but in interests of transparency you should probably be doing this anyway.

Just as with labs and imaging, never agree to a discount based on volume.

For reference, you can find a full price list for labs, imaging and medication from Atlas [here](#):

<https://tinyurl.com/rrgyyw6>

☐ Mark this done!      ☐ Not Applicable

For DPC clinics and any other healthcare institution, regulatory compliance is needed to protect staff, ensure quality patient care, prevent fraud as well as maintain privacy and usage standards when it comes to patient information.

#### To-dos:

- ☐ Applying for a CLIA Waiver
- ☐ Online resources



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## Maintaining Compliance

### Applying for a CLIA Waiver

**In order to perform tests that meet risk, error and complexity requirements under CLIA, you'll also need to apply for a CLIA waiver.**

You can find all of the information here:

<https://tinyurl.com/rfdydgp>

☐ Mark this done! ☐ Not Applicable

### Online resources

**There are a number of different online resources that contain valuable and reliable information that you can utilize to ensure that your DPC clinic adheres to rigid compliance standards:**

**MedTrainer** is an all-in-one compliance management suite that lets you train employees, manage records, compile incident reports and more.

The **CDC** implements many of the regulations related to protecting the country from healthcare threats. As such, they're one of the go-to regulatory bodies should you need more in-depth

compliance information.

The **Clinical Laboratory Improvement Amendments (CLIA) of 1988** regulates all laboratory testing – with the exception of research – performed on human specimens with the purpose of health assessment, or to diagnose, prevent, or treat disease. They can provide valuable insight when it comes to research and testing standards.

The **Occupational Safety and Health Administration** sets the standard when it comes to ensuring safe working conditions for American workers across a variety of industries.

The **DPC Manual** is an invaluable resource put together by DPC physician Kimberly Legg Corba. It outlines in detail compliance policies and procedures that doctors should adhere to when developing their DPC clinic.

☐ Mark this done!      ☐ Not Applicable

Every business needs a phone and a DPC clinic is no different. This doesn't have to be a complicated or difficult process. In fact, you can start with your own personal phone number, but sooner or later you're going to want to invest in a separate line for each member of staff. This way you can keep your private number separate from your business and take multiple client calls at once.

To-dos:

- ☐ Phones
- ☐ eFax



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## Office Phones and eFax

### Phones

Check out services such as **RingCentral**, **8x8** or **Webphones**. They'll quickly get you set up with a cloud-based phone system that scales to the size of your clinic.

☐ Mark this done! ☐ Not Applicable

### eFax

Should you ever need to send or receive them, you'll also want to set yourself up for e-faxing. **Humblefax** is an affordable option that lets you send and receive digital faxes via email without per page overage fees, and they'll give you a free fax number as well.

☐ Mark this done! ☐ Not Applicable

Requesting samples from drug companies is another great way of adding value to a patient's membership without undercutting any sort of income or profit from your clinic. It allows you to get your hands of some pretty expensive drugs for free, and distribute them to your patients as they need them. Because your patient panel is generally going to be quite a bit lower than your normal medical institution (600 as opposed to 3000), these samples go quite far.

To-dos:

☐ Where to get samples?



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Samples

## Where to get samples?

**Registering with drug companies online is going to be the easiest route when it comes to getting your hands on samples.** Different companies offer different samples, so it's important to sign up for as many as are useful to you to diversify your offerings. Below are some that we find helpful:

**NovoMedLink** – They've free to register online and will supply your insulin every month.

**Merck Sample Center** – Great for many different samples but especially steroid inhalers. Always request the maximum amount they'll allow and you'll have a good supply of dulera and asmanex.

**eMedSample** – Good for inhalers, diabetic medicines and insulin.

<http://www.archpatientassistance.com/> – Ideal for patient assistance on IUDs.

**Synthroid Direct Enrollment** – Costs \$22 per month, but will supply you with name brand synthesis.

**My Sample Closet** – Good for the following: amitiza, trintellix, uloric, dexilant, baxdela, amrix.

**GSKPro** – It can take up to 30 days to get your account/license information verified before you can order samples online. But if there are samples you need, they can do it over the phone: 888.593.5977

**Diathrive** – 100 diabetes test strips for \$8.

**Lo Lestrin FE:** <https://tinyurl.com/tr749x2>

**Luven** – A lubricant for postmenopausal vaginal dryness.

**Calmoseptine** – An ointment that relieves hemorrhoids, diaper rash, and GU irritation.

**Admelog** – Here you can get your hands on cheaper insulin.

**Emgality** – Migraine medicine.

**Sanofi Services** – Insulin such as lantus, toujeo, apidra and multaq.

☐ Mark this done!      ☐ Not Applicable



Just as with any business, a solid marketing strategy is needed in order to make your clinic's presence known to the immediate community and attract new patients. There are a number of different ways that you can go about this.

To-dos:

- ☐ Start with the why
- ☐ Types of marketing



16 Marketing your Clinic

## Start with the why

**Good marketing is all about selling a business's value proposition.** You should be able to clearly and concisely explain what your value proposition is, why you believe in it, and how this defines your clinic. Rather than simply listing what makes your clinic different from others on the market, think about your purpose, cause or belief behind it. When marketing yourself and your clinic, it's this purpose that you're going to want to put at the center of your strategy.

Check out this TED talk for a more thorough explanation:

[https://www.youtube.com/watch?v=u4ZoJKE\\_VuA](https://www.youtube.com/watch?v=u4ZoJKE_VuA)

☐ Mark this done! ☐ Not Applicable

## Types of marketing

### Flyers

Flyers may seem old school but they're still an effective means of disseminating information and letting people know that your business is out there. They're especially effective for local advertising.

Keep the flyers simple and interesting; have them display the name and address of your clinic, and highlight what you do as well as some great examples of savings that enrolling in Direct Care can bring.

Asking a printing company to make flyers for you can quickly become expensive. If you can, print them in your office. Post them anywhere community members gather regularly – local coffee shops, bakeries or farmer’s markets.

**See Sample PDFs:**

**Small Businesses Brochure**

**Marketing: AtlasMD Flyer**

**Marketing: Madsen Medical Flyer**

## Local Groups

Local groups are a great resource for meeting large numbers of potential patients.

A good starting point is to join the local chamber of commerce. Once you join you’ll have access to all of their events and, by extension, their members. Other groups worth exploring include:

- Rotary International
- Lions
- Church Groups
- Meetups
- Facebook Groups

If possible, ask to speak at these events. Remember, because you’re offering a valuable service to the local community, people will want to hear what you have to say. Doctors also don’t normally attend these types of meetings, so so people will be excited to meet you if you put yourself out there.

## Open Houses

Another strategy worth pursuing is to plan a few open houses at your clinic to discuss potential memberships. Have some free food and beverages on offer, and use social media such as a Facebook event to promote it. These meetings can be quite hit and miss, so keep it simple and don’t spend too much time on each event. That being said, host these events frequently. Word of mouth is a very powerful marketing tool, so even talking to a small group of attendees can create a ripple effect within the community.

## Contact Specialists

As someone running a clinic, you’re going to be both, directly and indirectly, working with medical specialists. It’s worthwhile to drop by specialists within the area and introduce yourself. After all, they have families and employees that could also use affordable care.

## Online Marketing

Being present online is absolutely crucial for tapping into a digital market of potential patients. It allows you almost limitless reach for targeting very specific demographics as well as the ability to communicate directly with patients should they need help or information.

While this guide has already covered how to set up and maintain social media accounts on Facebook, LinkedIn, Twitter and Instagram, you should also be optimizing your website for SEO. Search Engine Optimisation is the practice of optimizing your website so that it can be found more easily on search engines like Google. This is quite a process in its own right, but one that shouldn't be ignored.

Online marketing companies such as Center Street Digital specifically cater to Direct Care clinics and are worth checking out: <https://centerstreetdigital.com/dpc/>

## Coupling DPC with Employer Groups

Pitching to employers provides a significant opportunity for rapid growth within the DPC market. Most large employers have or should have a partially self-funded insurance plan. These are very valuable because they are exempt from the Affordable Care Act rules and regulations for employer-based insurance. Also, they are very flexible which allows the employer the space to design their perfect “wraparound” plan. Finally, but probably most important, a self-funded plan financially benefits employers immediately from the savings on copays, procedure fees, wholesale medicines, labs, imaging, pathology and decreased ER/Urgent care usage.

The important thing when talking to employers is to demonstrate how mutually beneficial – and how financially prudent – signing up to your clinic is. Show them the objective savings and how you are able to decrease specific costs compared to their previous financial year. Explain how their employees will benefit with regards to unlimited doctor visits, no copays, less time off work, the ability to contact their doctor when they need them, weekend coverage, and more.

Use the below attachment from a company we pitched to and sold to. Let the facts of this case study speak for you. Facts such as 31.8% of the insurance claims came from office visits (each \$40 copay not factored into this), and that 34.4% of their claims were for medications. Demonstrate that this group was paying \$12000 per year, per employee yet a single individual never claimed over \$3000 per year. [See Sample PDF: Employer Claim History](#)

You have to show them the massive savings that can be had when converting from a traditional, fully-insured plan to a partially self-funded plan. Be specific here. Demonstrate specifically how Direct Care can save money with regards to medication, labs, pathology, specialty referrals, etc. Emphasize how working with DPC will lower their premiums and their claims while improving the health of their employees at a much lower cost.

It's never too early to start taking pre-enrollments for your clinic.

To-dos:

- ☐ Provide a link to your enrollment form



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## Pre-Enrollments

### Provide a link to your enrollment form

**From the moment that your website is up and running, provide a link to the enrollment form to whichever EMR you're using and start taking sign-ups.** The sooner you start, the more patients you will have when your doors open.

- ☐ Mark this done!      ☐ Not Applicable

Below is a general list of office equipment you'll need for your clinic:

To-dos:

☐ Office Equipment



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## Office Equipment

### Office Equipment

- EKG machine
- Glucometer
- Pulse oximeter
- Differently sized BP cuffs
- Blue light
- Vision chart
- Ear irrigation kits
- Lab supplies (cultures- bacterial and viral, rapid strep, rapid flu, urine dip sticks, urine pregnancy test, UDS (in-office), all colored tops for labs (get a list from the lab as to what lab test for which tube)
- Differently sized butterflies and reg needles
- Stool culture kits
- Urine cups with wipes
- Tourniquets
- Microscope with slides (if needed).
- Otoscope/ophthalmoscope
- Mercury rectal thermometer
- Nebulizer
- Tubing
- Peak flow meter
- Scale – for both adults and infants
- AED
- Allergic reaction kit (contents listed in DPC Manual)
- Oxygen tank with a nasal cannula

- Desktops – you don't need a supercomputer – aim for \$300-500 for a decent tower type computer – it'll be plenty for your practice
- Apple or PC is your preference and budget
- Smartphone for after-hours patient communication
- One multi-function type printer
- Thermal (dymo) printers for lab labels, shipping, Rx bottles
- Dropbox account for online file storage (PRN)
- Greeting Cards
- Thermometer for the fridge if storing medicines, <http://idealsciences.com/common-questions/>
- Medical Equipment – gently used on eBay is fantastic

For an extensive list see the attachment:

**See Sample PDF: Complete Office Supply List**

☐ Mark this done!      ☐ Not Applicable

Task	Estimated Cost	Timeline
<input type="checkbox"/> Clinic Name	\$0-100	3/6 months
<input type="checkbox"/> Twitter	\$0	3/6 months
<input type="checkbox"/> Facebook	\$0	3/6 months
<input type="checkbox"/> Purchase Web Domain	\$10-150	3/6 months
<input type="checkbox"/> Legal Work	\$1000-2000	3/6 months
<input type="checkbox"/> Accountant	\$100-500/month	3/6 months
<input type="checkbox"/> Website & Logo Design	\$0-2000/month	3/6 months
<input type="checkbox"/> Check with Employer	\$0	3/6 months
<input type="checkbox"/> Start Opting Out of Private Ins	\$0	3/4 months
<input type="checkbox"/> Start Medicare Opt-Out	\$0	4/6 months
<input type="checkbox"/> Set Conversion Schedule	\$0	1/3 months
<input type="checkbox"/> Conversion Letters/Town Halls	\$100-1000	1/3 months
<input type="checkbox"/> Establish Business Entity	\$100	1/3/6 months
<input type="checkbox"/> Location	\$500-5000	1/3/6/9 months
<input type="checkbox"/> Location Remodeling	\$500-10000	1/3/6/months
<input type="checkbox"/> Talk with Staff	\$0	3/6 months
<input type="checkbox"/> Hire Staff	\$0-100	1/3/6 months
<input type="checkbox"/> Set Up Wholesale Medications	\$0-500	1/2 months
<input type="checkbox"/> Lab: Negotiate Discounts	\$0	3/6 months
<input type="checkbox"/> Imaging Discounts	\$0	1/3 months
<input type="checkbox"/> Pathology Discounts	\$0	1/3 months
<input type="checkbox"/> OSHA/Bio Waste/Medtrainer	\$50/month	1/2 months
<input type="checkbox"/> Office Phones	\$200-600	1/2/3 months
<input type="checkbox"/> Samples	\$0	1/2/3 months
<input type="checkbox"/> Marketing (always marketing)	\$0-1000	1/3/6/9 months
<input type="checkbox"/> Office Equipment	\$1000	1/2/3 months
<input type="checkbox"/> Pre-Enrollments	\$0	Always
<input type="checkbox"/> EMR - Pre-Sign-Ups, Texting, Dispensing, Billing, Mobile Charting, Labs, Scheduling	Free until you launch	3/6 months

## To-dos:

- ☐ Books on starting up a DPC clinic
- ☐ Business books



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## Recommended Reading

**Books on starting up a DPC clinic**

If you still have questions, Dr. Doug Farrago has two excellent books on starting up a DPC clinic:

- The Official Guide to Starting Your Own Direct Primary Care Practice: Buy on [Amazon](#)
- The Direct Primary Care Doctor's Daily Motivational Journal: Buy on [Amazon](#)

☐ Mark this done! ☐ Not Applicable

## Recommended Reading

**Business books**

The following books deal with customer service, leadership and other aspects of running a business you might find useful:

- The Science of Success – Charles Koch: Buy on [Amazon](#)
- Atlas Shrugged – Ayn Rand: Buy on [Amazon](#)
- The Tipping Point – Malcolm Gladwell: Buy on [Amazon](#)
- Blink – Malcolm Gladwell: Buy on [Amazon](#)
- The Lean Startup – Eric Ries: Buy on [Amazon](#)
- The Art of Possibility – Zander, Rosamund Stone, Benjamin: Buy on [Amazon](#)
- The Icarus Deception – Seth Godin: Buy on [Amazon](#)
- Contagious – Jonah Berger: Buy on [Amazon](#)
- Outside In – Harley Manning: Buy on [Amazon](#)
- How to Win Friends and Influence People – Dale Carnegie: Buy on [Amazon](#)
- The Checklist Manifesto – Atul Gawande: Buy on [Amazon](#)
- The Power of Habit – Charles Duhigg: Buy on [Amazon](#)
- Think and Grow Rich – Napoleon Hill: Buy on [Amazon](#)



- Three Feet from Gold – Dan John Miller: Buy on [Amazon](#)
- The Speed of Trust – Stephen M. R. Covey: Buy on [Amazon](#)
- Delivering Happiness – Tony Hsieh: Buy on [Amazon](#)
- Good Boss Bad Boss – Robert I. Sutton: Buy on [Amazon](#)
- Blue Ocean Strategy – W. Chan Kim: Buy on [Amazon](#)
- Exceptional Service for Exceptional Profit – Leonardo Inghilleri: Buy on [Amazon](#)

☐ Mark this done!      ☐ Not Applicable