

The Dental Practice Startup Checklist

Most startup checklists tell you what you need. This one tells you when to do it. Eleven phases, in order, from your first decision to your first patient.

YOUR TARGET OPENING DATE

TODAY'S DATE

How to use this checklist

- 1 Fill in your target opening date, then work backward to set a target date for each phase.
- 2 Phases overlap. Location scouting runs while financing is still in motion, and equipment planning overlaps software selection. Start each phase at the outside edge of its window.
- 3 Two phases are slower than they look. Insurance credentialing can take months rather than weeks, and buildout permits sit in a queue you do not control, so start both earlier than feels necessary.
- 4 Fill in the startup team block as you line up advisors, and log every quote in the table on the last page.

THE ELEVEN PHASES

01	Define your vision	12 to 18 months out	07	Insurance credentialing	5 to 6 months out
02	Financial planning	10 to 12 months out	08	Marketing before opening	4 to 5 months out
03	Location and lease	9 to 12 months out	09	Staffing	2 to 3 months out
04	Legal and compliance	8 to 10 months out	10	Opening week	Dress rehearsal
05	Software and technology	6 to 9 months out	11	First 90 days	Track weekly
06	Equipment planning	7 to 9 months out			

11
PHASES

123
TASKS TO CHECK OFF

12 to 18
MONTHS, START TO OPEN

01 Define your vision

12 TO 18 MONTHS OUT

TARGET DATE _____

- ☐ Decide startup vs. acquisition
- ☐ Define your ideal patient
- ☐ Choose general practice or specialty
- ☐ Determine your number of operatories
- ☐ Build a 3-year vision
- ☐ Define personal income goals
- ☐ Decide solo vs. partnership
- ☐ Build a preliminary business plan

02 Financial planning

10 TO 12 MONTHS OUT

TARGET DATE _____

Plan for \$500,000 at minimum. That is the ADA's figure before real estate, equipment, and staffing push it higher. Set your cash runway with your CPA and lender rather than a rule of thumb.

- ☐ Estimate your startup budget
- ☐ Build a working capital reserve
- ☐ Meet with a dental CPA
- ☐ Meet with a startup lender
- ☐ Compare SBA loans against dental-specific loans
- ☐ Establish business banking
- ☐ Build a 12-month cash flow model
- ☐ Determine your monthly overhead target

03 Location and lease

9 TO 12 MONTHS OUT

TARGET DATE _____

- ☐ Demographic study
- ☐ Competition analysis
- ☐ Street visibility
- ☐ Parking availability
- ☐ Lease negotiation
- ☐ Room for future expansion
- ☐ Utility hookups
- ☐ Buildout contractor
- ☐ Building permits

Your startup team

ASSEMBLE DURING PHASES 1 TO 3

DENTAL CPA

ATTORNEY

EQUIPMENT REP

INSURANCE BROKER

STARTUP LENDER

BUILDOUT CONTRACTOR

SOFTWARE REP

CREDENTIALING CONTACT

04 Legal and compliance

8 TO 10 MONTHS OUT

TARGET DATE _____

Registering your business and yourself as a provider

- ☐ Business entity formation (LLC or professional corporation)
- ☐ Employer Identification Number (EIN)
- ☐ National Provider Identifier (NPI)
- ☐ State dental license transfer or verification
- ☐ DEA registration for controlled substances

Insurance policies in place before opening

- ☐ Malpractice insurance
- ☐ General liability insurance
- ☐ Workers' compensation insurance

Compliance protocols your team follows day to day

- ☐ HIPAA policies for patient data
- ☐ OSHA compliance procedures
- ☐ Radiation permits for X-ray equipment
- ☐ Biomedical waste disposal plan
- ☐ Controlled substance storage protocol
- ☐ Employment handbook
- ☐ Patient privacy policies

05 Software and technology

6 TO 9 MONTHS OUT

TARGET DATE _____

Practice management features to look for

- ☐ Cloud-based platform, no in-office server
- ☐ Imaging integration
- ☐ Electronic claims
- ☐ Insurance processing
- ☐ Online scheduling
- ☐ Patient communications
- ☐ Digital forms
- ☐ Revenue cycle management
- ☐ AI documentation
- ☐ Reporting
- ☐ Mobile accessibility
- ☐ Setup and training support

Questions to ask every vendor

- ☐ Can it grow beyond one location?
- ☐ Does it require servers?
- ☐ How long is implementation?
- ☐ Is imaging built in?
- ☐ Does it support AI tools?
- ☐ Can you add payments later?
- ☐ Does it include patient communications?
- ☐ How difficult is switching later?

06 Equipment planning

7 TO 9 MONTHS OUT

TARGET DATE _____

- | | |
|--|---|
| ☐ Chairs | ☐ Intraoral scanners |
| ☐ Delivery units | ☐ Sterilization |
| ☐ Compressors | ☐ IT hardware |
| ☐ Vacuum | ☐ WiFi |
| ☐ Sensors | ☐ Backup internet |
| ☐ Cone beam CT (CBCT) | |

07 Insurance credentialing

5 TO 6 MONTHS OUT

TARGET DATE _____

- | | |
|---|---|
| ☐ PPO participation | ☐ Electronic funds transfer (EFT) |
| ☐ Medicaid, if applicable | ☐ Electronic remittance advice (ERA) |
| ☐ CAQH profile (Council for Affordable Quality Healthcare) | ☐ Umbrella coverage |
| ☐ Credentialing applications | ☐ Payor mix strategy |
| ☐ Fee schedules | |

08 Marketing before opening

4 TO 5 MONTHS OUT

TARGET DATE _____

- | | |
|---|---|
| ☐ Brand | ☐ Referral relationships |
| ☐ Logo | ☐ Community outreach |
| ☐ Website | ☐ Grand opening |
| ☐ Google Business Profile | ☐ Reviews strategy |
| ☐ Professional photography | ☐ Email marketing |
| ☐ Local search visibility | ☐ Direct mail |
| ☐ Social media | ☐ Paid ads |

09 Staffing

2 TO 3 MONTHS OUT

TARGET DATE _____

Roles to hire

- ☐ Office manager
- ☐ Dental assistants
- ☐ Hygienists
- ☐ Associate, if applicable

Running before your first hire's start date

- ☐ Payroll setup
- ☐ HR policies
- ☐ Employee benefits
- ☐ Onboarding and training plan
- ☐ Written procedures
- ☐ Employee handbook

10 Opening week

DRESS REHEARSAL

TARGET DATE _____

Test before your first patient

- ☐ Mock patient run-through
- ☐ Test phones
- ☐ Test internet
- ☐ Claims submission
- ☐ Credit card processing
- ☐ Appointment reminders
- ☐ Backup internet

Team and safety net ready

- ☐ Staff training complete
- ☐ Emergency protocols
- ☐ Vendor contacts posted

11 First 90 days

TRACK WEEKLY

TARGET DATE _____

Are new patients coming in

- ☐ New patients
- ☐ Referral sources
- ☐ Reviews

How the team performs, and whether you are getting paid

- ☐ Case acceptance
- ☐ Hygiene percentage
- ☐ Production
- ☐ Scheduling utilization
- ☐ Collection percentage
- ☐ Accounts receivable

Common startup mistakes

- Buying equipment before finalizing the floorplan
 - Underestimating working capital
 - Waiting too long to start credentialing
 - Choosing software based only on price
 - Delaying marketing until opening day
- Hiring everyone at once
 - Skipping written procedures for daily tasks
 - Ignoring cybersecurity
 - Buying technology that will not scale

Quotes and decisions

FILL IN AS YOU SHOP

WHAT YOU ARE BUYING	VENDOR	QUOTE	DECIDED
Practice management software			
Imaging			
Chairs and delivery units			
Sterilization			
Buildout contractor			
IT and network			
Marketing and website			
Payroll and HR			
Insurance and credentialing			
Other			

Software is phase 5, but it shapes every phase after it

Oryx is a cloud-based dental practice management platform with clinical charting, FDA-cleared imaging, patient communication, and revenue cycle management in one subscription. No server to buy in phase 6, no add-ons to license later. Practices opening from scratch qualify for the Oryx startup program. See how it fits your timeline.

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