Opening a Dermatology Practice: The Systems Checklist

What to set up, in what order, and when to start each item so your first claims get paid.

From Sherwin Gaddis, Affordable Custom EHR / Tarevo

Most new practices don't stall on clinical work. They stall on paperwork that started too late: a clearinghouse enrollment that isn't approved, a lab interface still in testing, a prescriber not yet set up for controlled substances. Work back from your opening day. The timeframes below are typical estimates, not promises; payers and vendors set their own pace.

4 months or more before opening

☐ **Decide how you will chart**	List the visit types you see most (full-body skin exam, biopsy, Mohs follow-up, cosmetic consult). Your EHR should match how you work, not the other way round.
☐ **Choose your EHR and practice management system**	Ask every vendor the five questions on page 2. Get pricing in writing for your expected number of providers.
☐ **Sign a Business Associate Agreement (BAA)**	Any vendor that stores patient data must sign one before you enter a single patient.
☐ **Plan data migration (if you're bringing patients)**	Ask what format your old records will come out in, and keep the old system read-only for lookups after the switch.

About 60 to 90 days before opening

☐ **Start clearinghouse enrollment**	Insurance enrollment through a clearinghouse can take up to about 60 days. Starting late is the most common reason first claims are delayed.
☐ **Start lab interface setup (Quest, Labcorp)**	Plan for roughly 30 days. Pathology results for biopsies need a working route back into the chart.
☐ **Set up ePrescribing, including controlled substances (EPCS)**	Each prescriber completes identity checks. Allow time for this.
☐ **Confirm credentialing with your main payers**	Without it, claims can be denied even when the clearinghouse works.

About 30 days before opening

☐ **Build your forms and templates**	Intake, consent, biopsy tracking, patient handouts. Test each with a real staff member, start to finish.
☐ **Turn on patient texting and reminders**	Appointment reminders reduce no-shows from week one.
☐ **Train staff on the live system**	Train before your first patient, not during.
☐ **Run a test claim**	Send one claim through end to end and confirm it is accepted.

Opening week

☐	**Check the first claims daily**	Catch rejections while they're still easy to fix.
☐	**Keep a list of what slows you down**	Every workflow that feels wrong is a change request. Your system should keep improving after go-live.

Five questions to ask any EHR vendor

1. What will I pay per month with my number of providers, including ePrescribing, texting and telehealth?
2. What setup fees are there, and what happens if I want to leave? Can I take my data with me?
3. If a workflow doesn't fit how I practice, who changes it, and how long does that take?
4. Who do I call after go-live, and do I reach someone who knows my setup?
5. Will you sign a BAA, and where is my data hosted and backed up?

How Tarevo answers them

Tarevo is a fully managed EHR and practice management system for independent dermatology practices. Hosting is $199 a month for up to five providers, month to month, with no long-term lock-in. Your data stays yours. When a workflow doesn't fit, you tell us and we change it. Your ideas have somewhere to go.

Next step: book a strategy session and bring this checklist. We'll go through your opening date and tell you which items to start first. **calendly.com/tarevo**