CHAPTER 4 CHECKLIST

Setting Up the Business

- [ ] Entity formed and operating agreement signed
- [ ] EIN issued and saved
- [ ] State tax registration done
- [ ] Local business license checked
- [ ] Trade name filed where your brand differs from your legal name
- [ ] Business bank account open, and personal money kept out
- [ ] Domain registered to your entity, with two-factor login
- [ ] Website ownership and export terms in writing
- [ ] Certification applied for in your entity's name, for your domain
- [ ] Merchant account in your entity's name, depositing to your bank
- [ ] Written answer on who owns patient records and how they are exported
- [ ] Compliance folder created with every document
- [ ] Annual filings and renewals on a calendar, with a backup owner