



Oregon

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Retainer Medical Practice Business Plan Guidelines

In response to questions from physician offices, the Insurance Division of the Department of Consumer and Business Services created these guidelines for the business plan that is required as part of an application for a retainer medical practice.

Executive Summary (Optional): Highlights of the retainer medical practice's mission/goals and plan.

Company Description: Legal establishment, history.

Product or Service:

- Describe what the retainer medical agreement will cover
- Frequency of dues
- Penalty/consequences for late or non-payment of dues
- Termination provisions—who can terminate, notice requirements, reasons for which termination can be made.



Marketing: Don't forget to attach copies of required documents.

- Any marketing materials
- Application materials
- Retainer medical agreement

Strategy and Implementation: Be specific.

- How many retainer medical patients are anticipated?
- Will the practice limit the number of retainer medical patients it can accept?
- How will the plan monitor its practice to ensure services are available in a timely manner?
- Describe the process for patients to make complaints.
- Describe how the practice will ensure it will be able to refund fees paid in advance if the practice is unable to provide the services promised.
- Include management responsibilities with dates and budgets. Make sure you can track results.

Management Team and Medical Professionals Providing Services: Describe the organization and the key management team members. List the full name of all medical professionals that will be providing services under the retainer medical agreement.

Other retainer practice information

Links to the law/rules about retainer practices, as well as application materials, can be found here: http://www.oregon.gov/DCBS/insurance/insurers/regulation/Pages/retainer_medical_practice.aspx