

THE PRIVATE PRACTICE CHECKLIST

The first place we want to start is with a checklist. Review each of the items with the following questions (mindset):

- Do I feel confident in this area?
- Do I have this area structured and organized?



BANK ACCOUNT



Set up a separate account (business account) that is under your business name/practice group name and tax ID number.

This account is used to receive and pay all business-related monies.

Golden rule is to keep your money separate.

SET-UP LEGAL STRUCTURE



Meet with a CPA
and/or business
attorney to explore
setting this up.

Structures can
range from
LLC to
Corporation.

Take time to think
long-term and
explore how the
structure impacts
your taxes.

TAKING INSURANCE



Get your group practice credentialed.

If you are a solo provider, you can communicate to your insurance company to switch to a group contract.

From this point, you can add clinicians to your practice to get contracted under the group contract.

NAMING THE PRACTICE



There are many directions you can go.

Naming a practice based on location can help with SEO (search engine optimization). This helps with getting found online. And in addition, can help with transitioning from a solo practice based on you to a group practice based on the group practice.

Naming your practice with your name can be advantageous with downfalls.

The advantage comes in the form of allowing your name to be a brand. Such as the popular name Dr. Phil or Gottman. If you develop yourself as a brand, then you can become well known in the community. This later can lead to your community trusting your practice whether it is a solo or group. The downfall can be that clients only want to work with you or view you when thinking about the practice. This makes it harder to showcase the clinicians. Though not impossible.

CONT'...

Another area to explore when picking a name is the location.

It can be helpful to create your business name based on the area that you live in. This helps potential clients find you.

"Your City" Therapy

"Your City" Counseling

Creating a unique name can benefit the counseling practice as it grows.

As an example, if you select to name your practice focused on your service niche this will give your community a clear picture of what you do.

Harmony Counseling Center

Taming Anxiety Clinic

PROFESSIONAL LICENSE

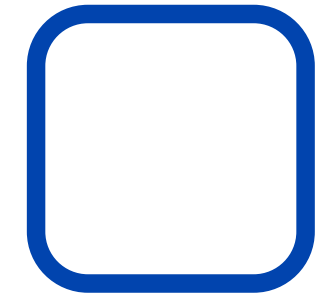


Make sure that you have the appropriate license to practice in your state.



In addition, take time to understand if you can take insurance with you license level or if there are specific regulations connected to your license in your state. You can do this by contacting your license board and researching the insurance panel you are wanting to join.

FINDING A LOCATION



Clinician Home-Based Therapy

You operate your counseling practice out of your home. This can be done through face-to-face or telehealth.

Client Home-Based Therapy

This structure means that you are going to the home of the client to provide services.

Subleasing an Office Space

You rent an office from a suite that is already being rented by another person.

Renting an Entire Office

You rent an entire office suite.

Purchasing a Commercial Property

Very similar to purchasing a home versus renting a home.

CREATE A LOGO



Part of having a private practice is branding.

A logo helps your practice look professional and stand out. You can place your logo on everything that represents you. That way when someone sees it, they will think about you and your practice.

SOCIAL MEDIA



When getting started, focus on 1 to 2 platforms. Such as Instagram and Facebook.

Too many social media platforms can become exhausting and lead to losing focus on those that you serve. Before selecting the platform, think about your ideal client and on which platform they spend the most time on.

CREATING A WEBSITE



Counselors in private practice should have a website.

Having a website can serve many purposes. Your website can be a place that gives you space to share your thoughts. Such as a blog all about your journey or how you help people with anxiety.

A place that potential visitors can learn more about the services that you are providing.

Your website can give the potential client or visitor an idea of the services provided, counseling approach, fees, and other counseling related details. To help your website shift from a standard website to an effective website, counselors can focus on SEO.

2 OPTIONS FOR WEBSITE DEVELOPMENT

Create your own website that you own.

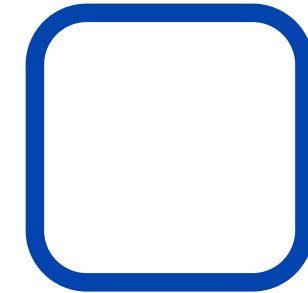
www.santoscounseling.com

You can do this by hiring a professional and having them develop the site and all its perks.

Rent your website from various companies.

They pretty much work with you on developing it and then handle all the site details that you request support with. Such as SEO or creating content.

BUSINESS CARDS



Having a clean and usable business card is effective to promoting your brand and marketing your practice. When it comes to the style of a business card my recommendation is to include the following:

A professional picture of yourself

Location, phone number, and email of the practice

Logo

Name of the practice

Something that the person can use

For example, you can have a discount for the first session, or a punch card that gives a 50% off session at the 10th session, or a short positive affirmation.

ACCOUNTING SYSTEM



Take time to select an accounting system for your practice.

Example includes QuickBooks.

SERVICES OFFERED



Identify a specialty

Take time to think about your ideal client. Create an avatar for your ideal client. Learn what they struggle with, what their pain points are, age norm, etc.

Average Joe Terms

Focus your marketing to using average joe terms. Instead of "I utilize CBT to address cognitive distortions" transition to "I help people that want to have healthier thoughts."

EMAIL LIST

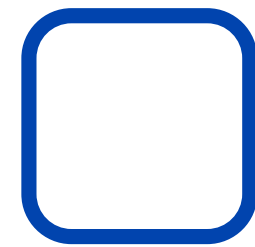


An email list is focused on a specific population of people that you want to build a relationship with and serve to some capacity.



For instance, for your private practice you can have an email list to serve all those to any degree interested in your counseling private practice. Each week or month, you can send an email focused on support, updates with the practice, or anything else you want to include. The goal is to basically build a community that directly sees you or your practice as the brand. Later when you become more established you can shift to using your email list to sell products such as books, courses, etc....)

PRIVATE PRACTICE PAPERWORK



Take time to create or purchase your documents. These include everything from informed consent to progress notes. A great place to start is with EHR systems. I use simple practice and they have many of the forms ready for you to use.

Informed Consent

Referral Form

Progress Note

Superbill Form

**Legal Court
Involvement Form**

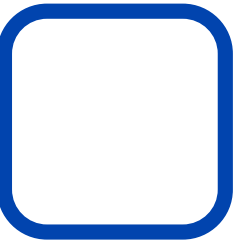
**Intake
Questionnaire**

Cancellation Policy

Clinician Payment Log

For example, you can have a discount for the first session, or a punch card that gives a 50% off session at the 10th session, or a short positive affirmation.

BUSINESS SYSTEMS TO INCORPORATE



Below are systems to implement in your business. As you review the system that fits your practice, take time to explore cost, confidentiality/privacy, features, and how the systems connect to your business. Take time to ensure that all systems are HIPAA compliant.

Email System

Gmail has G-Suite
Hush Mail

Phone System

All call technologies
Ring RX
Verizon business
Phone.com

Fax System

All call technologist
Faxage.com
Spectrum/Time Warner cable

Credentialing Support

Practice solutions
Free support from insurance companies

EHR System

Theranest
SimplePractice
TherapyNotes

BLOG OR VLOG



Blog is for those that prefer writing and vlog is for those that prefer to make videos.



Having a blog or vlog is one of the most powerful ways to build SEO (Search Engine Optimization). This is basically one of the best ways to ensure that your private practice is listed on the first page of Google when people search for counseling services that relate to you. Both take time, on average 3 to 6 months before noticeable changes are seen. Don't let this slow you down.