Private Practice Start-up for LPCCs Checklist

Disclaimer - *this checklist is ongoing and adaptive; this is not an exhaustive list. We also recommend consulting with an Attorney and CPA in starting your practice.*
** Not required

Basics Entity: *Consult an Attorney and CPA*

- ☐ Double-check if Private practice is right for you: Would it be better to gain more experience in a group or community setting? Do I want to do the business side of private practice? Do I want all the liability?
- ☐ Be properly licensed in your state.
- ☐ Get (or find) your National Provider Number (NPI): https://nppes.cms.hhs.gov/NPPES/Welcome.do
- ☐ Pick a Name (It can be your Name, it should follow BBS ethics, and your name can change). https://www.bbs.ca.gov/pdf/publications/adv_guide.pdf
    - ☐ **Apply for DBA if not going by your name
- ☐ Determine your business structure (Sole-Proprietor, S-Corp, LLC, etc. *Note LPCCs cannot register as LLC in the state of CA).
    - ☐ **Get an EIN/Tax ID (instead of using SSN)
- ☐ Sign up for Malpractice Insurance: at least $1,000,000/$3,000,000 coverage
- ☐ Apply for a Business License (or two if needed for city, county, township, municipality, UNI)
- ☐ Register your business with your state government.
- ☐ **Create an official business plan
- ☐ Decide the type of practice - individual, group, counseling center. (This can change)
- ☐ Set Clear Policies: Appointment cancellation policy etc.

- ☐ Create Paperwork, including:
    - ☐ Intake Form (one for Individuals, Children, Couples, and Families)
    - ☐ Notice of Privacy/ HIPAA Statement
    - ☐ Informed Consent
    - ☐ HIPAA Release of Information
    - ☐ **Finance Agreement
    - ☐ **Credit Card Authorization
    - ☐ **Superbill for Out of Network Reimbursement
    - ☐ **Insurance Information form if you take insurance
    - ☐ **Technology-Assisted Therapy Consent
    - ☐ **COVID consent
    - ☐ **Assessments Provided (i.e. PHQ-9, GAD-7)
    - ☐ **Referral forms
- ☐ Decide on how and structure for taking notes (paper, EHR, SOAP, etc)
- ☐ Create a vacation or transition plan
- ☐ Create a Professional Will (How will your clients be told about your death, who will have access to your files and help your clients transition care)
- ☐ What Steps will you do when your client needs a higher level of care, is in immediate danger of hurting self or others, or you suspect child abuse, elder abuse, or abuse of a vulnerable adult
    - ☐ Research Laws and ethics on reporting in your state
    - ☐ Research Inpatient/outpatient care, and emergency psychiatric evaluation in your area
- ☐ Have a plan for a potential HIPAA breach
- ☐ Multicultural counseling ongoing work: questioning biases, learning about other backgrounds

Interacting With Clients:

- ☐ Determine and Secure where or how you will provide therapy (Telehealth or an Office)
    - ☐ **For Telehealth finding a HIPAA compliant software to use
    - ☐ **Apply for Telehealth Certification if required in your state
    - ☐ **For in-office sessions, finding an office to rent (possibly furnish or sublet by hr/day)
        - ☐ Research if the office is Zoned for this type of business
- ☐ Decide on your HIPAA compliant email and phone plan
- ☐ **If you provide a Free 15 min Consultation phone call, have a plan on how to want to talk about your practice and what you want to know about the potential client
- ☐ Develop a screening process to work with clients your work best with and help find referrals for people you are not as skilled or not set up to help

Finances: *Consult a CPA*

- ☐ Determine how much you will charge
    - ☐ **Determine Your Budget
    - ☐ **Will you do a sliding scale or offer a lower fee
- ☐ Decide on insurance panel participation.
    - ☐ **Panel with insurance panels,
        - ☐ **Apply for CAQH #: https://proview.caqh.org/
    - ☐ **Hire insurance biller
- ☐ Determine how you will bill for sessions: Credit Card, Cash, Paypal, Check, etc.
    - ☐ **Take credit cards & then identify which credit card processor you will decide to go with.
- ☐ **Open a Business Bank Account

- [ ] Determine how you will go about doing book-keeping: Excel, Quickbooks, Wave, your friendly CPA
    - [ ] Create a basic Ledger to keep track of sessions billed
- [ ] Pay Quarterly Taxes (state and federal)
- [ ] Pay Taxes, State, Federal, and City Taxes
    - [ ] **Hire CPA to help file taxes and estimate your quarterly taxes
- [ ] **Look into loan and payment plan if needed
- [ ] **Disability Insurance if you become ill or disabled

Practice Mission

- [ ] **Create a mission statement & Vision
- [ ] ** Identify your practice niche, get trained accordingly

Marketing

- [ ] Create a marketing plan that works for you. Lots of options, but focus on a couple that you can do really well: online marketing, networking, workshops, FB groups, etc.
    - [ ] Identify your practice focus, who will you serve, and where “do they hang out” to market to them in that setting (ie. Facebook, coffee shops, hospice care, etc)
    - [ ] Create an elevator pitch for potential clients, other therapists, or other referral sources.
    - [ ] **Track where you are getting clients to learn your ‘return on investment’ and pivot your marketing if needed
    - [ ] **Develop your brand story
    - [ ] **Find your specialty or niche
    - [ ] **Identify current referral sources and potential referral sources.
    - [ ] **Double-check your current marketing on being an LPCC with what BBS allows.

- [ ] **Create Printed Material: Business Cards, brochures, Letterhead
    - [ ] **Get Headshots
- [ ] **Determine if you plan to list yourself on online directories: Psychology Today, Good Therapy, Selling the Couch, ZenCare, TherapyDen, etc
- [ ] **Create your practice website - Squarespace, Wix, Weebly, BrighterVision, SimplePractice, Wordpress.
    - [ ] **get your own domain name

Other

- [ ] **Identify if you want to create secondary or tertiary revenue streams: coaching, blogging, speaking, social media, subletting office, etc.
- [ ] **Determine if you want a business planner/advisor/fiduciary.
    - [ ] **Join a mentorship community: CALPCC, Selling the Couch, Zynme, local regional MH practitioners, entrepreneur groups.
- [ ] **If you need more business advice or guidance, seek a business/professional coach.
- [ ] **Setting up a walk and talk therapy or Coaching, get train appropriately, and update paperwork
- [ ] **Peer consultation and supervision
- [ ] **Do your own therapy

