Private Practice Checklist

The Private Practice Checklist helps you organize and manage key aspects of your practice, from licensing and billing to client records and marketing. Regularly use and customize it to track progress, prioritize tasks, and ensure your practice runs smoothly and remains compliant.

Category	Actions	Notes
Practice plan	☑ Name your private practice ☑ Define vision, mission, and goals ☑ List services offered	Named "Harmony Counseling Services"; vision is to provide accessible, compassionate mental health care for families and individuals; primary services include individual therapy, family counseling, and stress management workshops.
Legal frameworks	☑ Consult with a legal advisor ☑ Develop a legal framework	Consulted attorney Sarah Wilkins to draft client agreements and privacy policy; finalized contracts compliant with state and federal laws.
Licensing	☑ Check your practice license ☑ Obtain further licenses if necessary ☑ Document compliance with legal requirements	Confirmed current state counseling license valid until December 2026; obtained additional telehealth license for out-of-state clients.
Financial plan	☑ Create a budget ☑ Open a practice bank account ☑ Identify funding sources ☑ Create a financial plan	Budget set at $30,000 for the first year; opened a practice account with First National Bank; secured a $10,000 startup loan.
Location and logistics	☑ Research potential locations ☑ Choose a space ☑ Design the practice space	Secured a lease at 125 Maple Avenue, Suite 4B; space includes three offices and a shared waiting area.

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Insurance	☑ Research and select an appropriate insurance program ☑ Select office technology	Chosen provider: State Farm Business Insurance, including malpractice and general liability coverage.
Staff recruitment	☑ Identify staffing needs ☑ Recruit qualified personnel if required	Hired one office assistant and contracted a part-time therapist specializing in child psychology.
Network	☑ Build a professional network	Established connections with local schools and medical clinics for referrals; joined the National Association of Social Workers (NASW).
Equipment and resources	☑ List required resources ☑ Purchase equipment and resources ☑ Provide professional contact information	Purchased laptops, therapy supplies, and waiting area furniture; created a website (www.harmonycounselingservices.com).
Devise policies	☑ Devise policies ☑ Set client expectations ☑ Prepare referral forms ☑ Establish policies	Developed policies for scheduling, cancellations, and client confidentiality; introduced clear expectations for telehealth sessions.
Develop forms and documents	☑ Create client information forms ☑ Include informed consent forms ☑ Prepare referral forms ☑ Set up insurance reimbursement forms	Created detailed intake forms and consent documents; set up electronic insurance billing forms.

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Practice management software	✔ Select practice management software ✔ Practice and implement the software	Chose Carepatron for scheduling, billing, and record-keeping; staff trained on software use.
Marketing	✔ Create a marketing plan	Launched a social media campaign and distributed brochures to community centers; offering free initial consultations for new clients.
Patient experience	✔ Develop plans and protocols to enhance patient experience	Introduced feedback surveys and personalized welcome packets for new clients; created a calming and private environment.
Ongoing monitoring and development	✔ Continue professional development ✔ Document progress and reflections	Enrolled in a continuing education course on trauma-informed care; conducting monthly team reviews to track client progress.

Additional notes

First client scheduled for February 1, 2025.
Aim to expand services to include group therapy by the end of the year.
Quarterly financial reviews planned.