

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	<ul style="list-style-type: none"><input type="checkbox"/> Name your private practice<input type="checkbox"/> Define vision, mission, and goals<input type="checkbox"/> List services offered	
Legal frameworks	<ul style="list-style-type: none"><input type="checkbox"/> Consult with a legal advisor<input type="checkbox"/> Develop a legal framework	
Licensing	<ul style="list-style-type: none"><input type="checkbox"/> Check your practice license<input type="checkbox"/> Obtain further licenses if necessary<input type="checkbox"/> Document compliance with legal requirements	
Financial plan	<ul style="list-style-type: none"><input type="checkbox"/> Create a budget<input type="checkbox"/> Open a practice bank account<input type="checkbox"/> Identify funding sources<input type="checkbox"/> Create a financial plan	
Location and logistics	<ul style="list-style-type: none"><input type="checkbox"/> Research potential locations<input type="checkbox"/> Choose a space<input type="checkbox"/> Design the practice space	

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Insurance	<div>Research and select an</div> <div><input type="checkbox"/> appropriate insurance program</div> <div><input type="checkbox"/> Select office technology</div>	
Staff recruitment	<div><input type="checkbox"/> Identify staffing needs</div> <div><input type="checkbox"/> Recruit qualified personnel if required</div>	
Network	<div><input type="checkbox"/> Build a professional network</div>	
Equipment and resources	<div><input type="checkbox"/> List required resources</div> <div><input type="checkbox"/> Purchase equipment and resources</div> <div><input type="checkbox"/> Provide professional contact information</div>	
Devise policies	<div><input type="checkbox"/> Devise policies</div> <div><input type="checkbox"/> Set client expectations</div> <div><input type="checkbox"/> Prepare referral forms</div> <div><input type="checkbox"/> Establish policies</div>	
Develop forms and documents	<div><input type="checkbox"/> Create client information forms</div> <div><input type="checkbox"/> Include informed consent forms</div> <div><input type="checkbox"/> Prepare referral forms</div> <div><input type="checkbox"/> Set up insurance reimbursement forms</div>	

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Practice management software	<div><input type="checkbox"/> Select practice management software</div> <div><input type="checkbox"/> Practice and implement the software</div>	
Marketing	<div><input type="checkbox"/> Create a marketing plan</div>	
Patient experience	<div><input type="checkbox"/> Develop plans and protocols to enhance patient experience</div>	
Ongoing monitoring and development	<div><input type="checkbox"/> Continue professional development</div> <div><input type="checkbox"/> Document progress and reflections</div>	
Additional notes		