

Private Practice Checklist

| Category | Details | Actions | Notes |
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| Practice Plan | Develop a plan for your practice by identifying your visions and goals for your first year. This will inform your why, and set the foundation of your practice and protocols | Define the following to inform your practice plan: <ul style="list-style-type: none"><input type="checkbox"/> Name your private practice<input type="checkbox"/> Vision<input type="checkbox"/> Mission<input type="checkbox"/> Goals<input type="checkbox"/> Services offered | |
| Legal Frameworks | Identify the legal frameworks that will guide your practice. This may involve networking with experienced individuals, or seeking advice from external bodies. | <ul style="list-style-type: none"><input type="checkbox"/> Consult with a legal advisor<input type="checkbox"/> Develop a legal framework | |
| Licensing | Check your license to work in the state, and the legal healthcare requirements. | <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 | Create a budget and identify funding sources, aspirations, and financial projections. | <ul style="list-style-type: none"><input type="checkbox"/> Create a budget<input type="checkbox"/> Create a practice bank account<input type="checkbox"/> Identify funding sources<input type="checkbox"/> Create a financial plan | |

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| <p>Location and Logistics</p> | <p>Find a location and begin setting up the practice space.</p> | <ul style="list-style-type: none"> <input type="checkbox"/> Research potential locations <input type="checkbox"/> Choose a space <input type="checkbox"/> Begin designing the practice space | |
| <p>Insurance</p> | <p>Ensure you have insurance for your practice and liabilities.</p> | <ul style="list-style-type: none"> <input type="checkbox"/> Research and select an appropriate insurance program <input type="checkbox"/> Select office technology | |
| <p>Staff Recruitment</p> | <p>Hiring additional staff may be beneficial for administrative purposes, depending on your practice.</p> | <ul style="list-style-type: none"> <input type="checkbox"/> Identify staffing needs, and recruit qualified personnel if required | |
| <p>Network</p> | <p>By networking with others in your profession, you can build contacts, gain tips and market your practice.</p> | <ul style="list-style-type: none"> <input type="checkbox"/> Build a network of others within your profession, or may provide guidance. | |
| <p>Equipment and Resources</p> | <p>Identify the equipment and resources required to optimize your practice.</p> | <ul style="list-style-type: none"> <input type="checkbox"/> List resources you require <input type="checkbox"/> Purchase equipment and resources <input type="checkbox"/> Professional contact information <input type="checkbox"/> Create a website | |

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| Devise Policies | Create clear, formal policies to manage your practice. This informs clients expectations about your practice. | <input type="checkbox"/> Define what your practise provides <input type="checkbox"/> Define what clients should expect <input type="checkbox"/> Devise policies | |
| Develop Forms and Documents | Create client forms to streamline your practice. | Here are some initial forms to consider making: <input type="checkbox"/> Client information <input type="checkbox"/> Informed consent <input type="checkbox"/> Referral <input type="checkbox"/> Insurance reimbursement | |
| Practice Management Software | Find a practice management system to optimize your practice | <input type="checkbox"/> Select software <input type="checkbox"/> Practice and implement the software | |
| Marketing | Build a marketing strategy and began patient acquisition | <input type="checkbox"/> Create a marketing plan | |
| Patient Experience | Identify ways to optimize your practice, and centralize patients. | <input type="checkbox"/> Create a plan and protocols to enhance patient experiences | |
| Ongoing Monitoring and Development | Track of your progress and reflections, and ensure you are proactive in learning about medical developments | <input type="checkbox"/> Continue professional development <input type="checkbox"/> Document your progress and reflections | |