

Starting a Private Practice in Counseling Checklist

Category	Details	Actions	Execution
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 counseling 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 	

<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 	

<p>Devise Policies</p>	<p>Create clear, formal policies to manage your practice. This informs clients expectations about your practice.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Define what your practise provides <input type="checkbox"/> Define what clients should expect <input type="checkbox"/> Devise policies 	
<p>Develop Forms and Documents</p>	<p>Create client forms to streamline your practice.</p>	<p>Here are some initial forms to consider making:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Client information <input type="checkbox"/> Informed consent <input type="checkbox"/> Referral <input type="checkbox"/> Insurance reimbursement 	
<p>Practice Management Software</p>	<p>Find a practice management system to optimize your practice</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Select software <input type="checkbox"/> Practice and implement the software 	
<p>Marketing</p>	<p>Build a marketing strategy and began patient acquisition</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Create a marketing plan 	
<p>Patient Experience</p>	<p>Identify ways to optimize your practice, and centralize patients.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Create a plan and protocols to enhance patient experiences 	

<p>Ongoing Monitoring and Development</p>	<p>Track of your progress and reflections, and ensure you are proactive in learning about medical developments</p>	<ul style="list-style-type: none"><input type="checkbox"/> Continue professional development<input type="checkbox"/> Document your progress and reflections	
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