Starting A Private Practice

Starting your own practice can feel overwhelming, but breaking it down into manageable steps makes the journey clearer. This template walks you through the key areas you'll need to address, so you can focus on what matters most—caring for your clients.

Business foundation
Legal structure:
☐ Choose your business entity (LLC, corporation, sole proprietorship) ☐ Register your business name with your state ☐ Obtain your Federal Tax ID (EIN) from the IRS ☐ Apply for required state and local business licenses ☐ Register with your state's professional licensing board
Remarks & notes:
Professional requirements:
☐ Verify your clinical license is current and in good standing ☐ Obtain malpractice insurance coverage ☐ Join professional associations relevant to your specialty ☐ Complete any required continuing education credits ☐ Set up clinical supervision arrangements (if required)
Remarks & notes:

Financial planning	
Startup costs assessment (One-time expenses)	
Office setup and furniture:	Technology and software:
Initial marketing materials:	Legal and accounting setup:
Insurance deposits:	
Monthly operating expenses	
Rent/utilities:	Software subscriptions:
Insurance premiums:	Marketing budget:
Professional development:	
Revenue planning	
Target client capacity:	Average session fee:
Projected monthly revenue:	Break-even point:

Practice setup

Physical space:

- [ ] Secure office location (consider telehealth-only options)
- [ ] Ensure HIPAA-compliant setup with proper soundproofing
- [ ] Install necessary technology (reliable internet, phone system)
- [ ] Create a welcoming, therapeutic environment
- [ ] Set up secure storage for client records

Remarks & notes:

Technology infrastructure:

- [ ] Choose practice management software for scheduling and billing
- [ ] Set up HIPAA-compliant email and communication systems
- [ ] Implement secure client record storage
- [ ] Establish a telehealth platform (if offering virtual sessions)
- [ ] Create backup systems for all digital records

Remarks & notes:

Documentation:

- [ ] Intake forms and assessment tools
- [ ] Consent forms and privacy notices
- [ ] Treatment planning templates
- [ ] Progress note formats (SOAP, DAP, etc.)
- [ ] Discharge planning documents

Remarks & notes:

Billing and payment:

- [ ] Decide on insurance vs. private pay model
- [ ] Set up a merchant account for credit card processing
- [ ] Create clear fee schedules and payment policies
- [ ] Establish billing cycles and collection procedures
- [ ] Research insurance credentialing requirements (if applicable)

Remarks & notes:

Marketing and client acquisition

Professional presence:

- [ ] Create a professional website with clear services and contact info
- [ ] Set up Google My Business listing
- [ ] Develop referral relationships with other healthcare providers
- [ ] Join local professional networks and community organizations
- [ ] Create educational content that showcases your expertise

Remarks & notes:

Client onboarding process:

Compliance and risk management

HIPAA compliance:

- ☐ Complete HIPAA risk assessment
- ☐ Create privacy policies and procedures
- ☐ Train any staff on privacy requirements
- ☐ Implement secure communication protocols
- ☐ Establish data breach response plan

Remarks & notes:

Professional standards:

- ☐ Develop clear boundaries and ethical guidelines
- ☐ Create emergency contact procedures
- ☐ Establish consultation relationships with colleagues
- ☐ Set up crisis intervention protocols
- ☐ Maintain current knowledge of scope of practice

Remarks & notes:

Quick start checklist

Week 1-2	Week 3-4
☐ Legal structure and registration ☐ Business bank account setup ☐ Malpractice insurance secured	☐ Office space secured and set up ☐ Technology systems implemented ☐ Documentation templates created
Month 2	**Month 3**
☐ Marketing materials developed ☐ Referral network outreach begun ☐ First clients scheduled	☐ Systems refined based on initial experience ☐ Financial tracking implemented ☐ Growth strategies evaluated

Additional notes

💡 *Building a successful practice takes time. Focus on providing excellent care to your initial clients—they'll become your best referral sources. You don't need everything perfect from day one; you need systems that work and can grow with your practice.*