



# PRIVATE PRACTICE

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## STARTUP CHECKLIST

### PHASE ONE-SOME LOGISTICS

- 1. Get a NPI number
- 2. Get an EIN (substitute for your social security number)
- 3. Get Liability Insurance
- 4. Determine how you will structure your business
- 5. Name your business

### PHASE TWO-OFFICE TASKS

- 1. Develop Office policies
  - a. Establish Fee
  - b. Cancellation policy
  - c. Emergency coverage
  - d. How you will accept payment

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- 2. Create practice paperwork.
  - a. Informed Consent
  - b. Protected Health Information
  - c. Insurance release (if you accept insurance)
  - d. Notice of Privacy Policies if you are a covered entity
  - e. Client Intake Form (Demographic)
  - f. Superbill Form
  
- 3. Establish Your Office Space
  - a. Find Your Space
  - b. Furnish your office
  - c. Get Your Business License

## IF YOU PLAN TO ACCEPT INSURANCE

- 1. Register at CAQH
- 2. Research different insurance companies
- 3. Start applications to companies-expect it to take 6 months for approval

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#### PHASE THREE- SET UP YOUR FINANCIALS

- 1. Open a business checking account
- 2. Figure out how you will track income and expenses and establish that.
- 3. Get a business credit or debit card
- 4. Determine if you want or need Disability Insurance

#### PHASE FOUR- SET UP THE TECH

- 1. Establish your phone system
- 2. Create a business email address-encrypted or not?
- 3. Set up an Electronic Health Record system
- 4. Establish a credit card processor
- 5. Get a HIPAA compliant telehealth platform

#### PHASE FIVE-ESTABLISH YOUR MARKETING

- 1. Define your niche
- 2. Get professional listings written and posted
- 3. Pick your website company-Squarespace is a good drag and drop builder
- 4. Get a professional photo for listings and webpage
- 5. Get professional listings written and posted
- 6. Write copy for website
- 7. Do Search Engine Optimization for your website