

PRIVATE PRACTICE STARTUP CHECKLIST

№	ACTIVITIES	<input checked="" type="checkbox"/>
1	Get licensed in your state	<input type="checkbox"/>
2	Get or find your <u>NPI number</u>	<input type="checkbox"/>
3	Select a business name	<input type="checkbox"/>
4	Determine your business structure (Sole-Proprietor, S-Corp, LLC, etc.)	<input type="checkbox"/>
5	Sign up for Malpractice Insurance: at least \$1,000,000/\$3,000,000 coverage	<input type="checkbox"/>
6	Create a professional email account	<input type="checkbox"/>
7	Apply for a Business License (or two if needed for city, county, township, municipality, UNI)	<input type="checkbox"/>
8	Register your business with your state government	<input type="checkbox"/>
9	Create a business plan	<input type="checkbox"/>
10	Decide on the services you want to provide (individual, group, etc.)	<input type="checkbox"/>
11	Set clear policies (cancellation policy, etc.)	<input type="checkbox"/>
12	Create intake paperwork	<input type="checkbox"/>
13	Decide on software and structure for case notes	<input type="checkbox"/>
14	Create vacation or transition plan	<input type="checkbox"/>
15	Create professional will	<input type="checkbox"/>
16	Join CAMFT or other professional organization to connect with others	<input type="checkbox"/>
17	Conduct a HIPAA compliance audit of your practices, record keeping	<input type="checkbox"/>
18	Hire a CPA and work with them to determine fee schedule and budget	<input type="checkbox"/>
19	Open a business bank account	<input type="checkbox"/>
20	Choose a bookkeeping system or software (Quickbooks, Honeybook, etc.)	<input type="checkbox"/>



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№	ACTIVITIES	<input checked="" type="checkbox"/>
21	Create a mission and vision statement for your practice	<input type="checkbox"/>
22	Identify and articulate your practice niche	<input type="checkbox"/>
23	Write a 1-2 paragraph statement about your therapeutic approach	<input type="checkbox"/>
24	Build a website for your practice with your own domain name	<input type="checkbox"/>
25	Build a marketing plan for your practice	<input type="checkbox"/>
26	Get a headshot, preferably a professional one	<input type="checkbox"/>
27	List practice on online directories: Psychology Today, Good Therapy, etc.	<input type="checkbox"/>
28	Determine if you want to create secondary income streams (i.e., speaking)	<input type="checkbox"/>
29		<input type="checkbox"/>
30		<input type="checkbox"/>
31		<input type="checkbox"/>
32		<input type="checkbox"/>
33		<input type="checkbox"/>
34		<input type="checkbox"/>
15		<input type="checkbox"/>
16		<input type="checkbox"/>
17		<input type="checkbox"/>
18		<input type="checkbox"/>
19		<input type="checkbox"/>
20		<input type="checkbox"/>



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