



## Private Practice Checklist

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These are the tasks I had to do for opening the Counseling Hut, when I was still a Registered Intern. I wanted to make it available for others who are considering opening a private practice. There are a lot of things here that are by no means necessary, and there are things that are missing. Many of the tasks are specific to National Certified Counselors and Licensed Professional Counselor interns, so those with different credentials would need to find out what the equivalent is.

I hope it is still useful as a starting point!

### For Office

Contact Phone company: voice line, fax line, TTY line

Find out how to get into the yellow pages

Set up voice mail

Get Internet connection

Get federal Employee Identification Number

Register phone number with "do not call" list

Design stationery: instead of getting it printed, design one in word processor

letterhead

envelope

return address labels

Design signage

Design intake forms

Client data

Informed consent

Assessment form

Consent for participation (for participants who are not the Identified Patient)

Professional Disclosure Statement

Fee schedule / sliding-scale table

Optional: Client bill of rights and HIPAA policy

Design other forms

progress note template

appointment card

receipt

release of information

waiting list

billing statement

client contact log

fax cover sheet

Design map or directions

Design contact hours and supervision hours log

Check NCC status with NBCC

Update insurance policy with HPSO

### Optional

- Register Assumed Name with the business registry
- Set up business bank account
- Register Web domain name
- Set up Web site
- Set up PayPal or credit card account
- Get Federal Employer Identification Number
- Get Business Identification Number (Combined Employer's Registration form)

- Find lawyer
- Get Braille translations of forms
- Print out large-print versions of intake documents
- Create electronic database of clients

### Advertising

- Draft letter to professionals from whom you want referrals
- Create electronic database of other providers (to advertise to)
- Draft classified ad

### OBLPCT Forms

Send to OBLPCT:

Form 2A: Degree-Program Work Experience

Internship hours only. Fill out everything but the signature.

Meet with professor face to face so you can get signature right away.

If you have more than two sites, add extra copies

Form 1: Request for License

Form 5: Professional Disclosure Statement(s)

One for each site

Copy the template. Be sure to include site address.

Form 7: Stipulated supervised work plan

Make sure it shows your supervisor has:

Three years experience since licensure

30 hours of post-master's training in supervision

Administrative supervisor is anyone at your office

For sole private practice, you are your own supervisor.

This supervisor does not provide clinical supervision.

It can be anyone who has the authority to let you work there.

If you have more than two sites, add extra copies of the signature page.

Check for \$125

Have sent to OBLPCT:

Form 3: Verification of Exam.

Have NBCC send to OBLPCT directly.

You need to be certified as NCC before NBCC will send this.

Transcript: Have university send to OBLPCT directly.

It takes about two months to register. However, registration is effective retroactive to when OBLPCT receives all the paperwork; if you are seeing clients already, then start getting supervision.

**Shopping!****Computer**

- word processing software
- virus protection

**Printer/Copier/Fax**

- avoid inkjets

**USB hub****Ethernet hub****USB drive for confidential information****USB drive for other information****Adding machine****Shredder****CD-Rs for backups****Typewriter**

- ribbons and correction ribbon

**Clocks****Phone/Answering machine****TTY machine****Lockable file cabinet****Power strips****Extension cords****Phone extension cords****Networking cables****Mirror****Bookcases****Chairs****Group meeting chairs**

- stackables or folding

**Tables****Storage side tables****Copying/Printing paper**

- (at least 2,000 initially)

**Stationery paper and envelopes****Return envelopes for bill payments****Pendaflexes****File folders with top-clasps**

- "classification folders"

**Air purifier****Clipboards****Letter trays****Desk organizers****Paper clips****Pushpins****Binder clips****Stamps****Utility knife****Rubber bands****Picture hangers****Garbage can****Garbage bags****Pen holders****Dishsoap****Toiletry**

- soap, toothbrush, toothpaste

- comb

- water cups / cup holder

**Medications and first aid****Kleenex****Hand-sanitizer****Sanitizing wipes****Gumming wand****Gluesticks****Yellow stickies****Pens and pens and pens****Stapler****Scotch tape****Two-hole puncher****Waiting room table****Waiting room chairs****Waiting room bookcases****Magazine rack****Toys****Reading materials**

- (go to <http://nimh.nih.gov/> for free mental health information)

**White noise generator****Therapeutic art supplies**

- markers

- crayons

- thicker paper

- play-dough