



## **Private Practice Checklist**

Jordan J. Shin, MS, LPC

Revised July 1, 2011

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

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