



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	Clipboards
word processing software	Letter trays
virus protection	Desk organizers
Printer/Copier/Fax	Paper clips
avoid inkjets	Pushpins
USB hub	Binder clips
Ethernet hub	Stamps
USB drive for confidential information	Utility knife
USB drive for other information	Rubber bands
Adding machine	Picture hangers
Shredder	
CD-Rs for backups	Dishsoap
Typewriter	Toiletry
ribbons and correction ribbon	soap, toothbrush, toothpaste
	comb
Clocks	water cups / cup holder
	Medications and first aid
Phone/Answering machine	Kleenex
TTY machine	Hand-sanitizer
Lockable file cabinet	Sanitizing wipes
Power strips	Gumming wand
Extension cords	Gluesticks
Phone extension cords	Yellow stickies
Networking cables	Pens and pens and pens
	Stapler
Mirror	Scotch tape
Bookcases	Two-hole puncher
Chairs	
Group meeting chairs	Waiting room table
stackables or folding	Waiting room chairs
Tables	Waiting room bookcases
Storage side tables	Magazine rack
	Toys
Copying/Printing paper	Reading materials
(at least 2,000 initially)	(go to http://nimh.nih.gov/ for free mental hea
Stationery paper and envelopes	White noise generator
Return envelopes for bill payments	
Pendaflexes	Therapeutic art supplies
File folders with top-clasps	markers
"classification folders"	crayons
	thicker paper
Air purifier	play-dough
Garbage can	
Garbage bags	
Pen holders	