The Counseling Hut

PO Box 50113, Eugene, OR 97401
541-342-8144 (Phone/TTY) 541-342-1724 (Fax)
http://www.thecounselinghut.org/

Private Practice Checklist

Jordan J. Shin, MS, LPC
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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
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