

# **The Private Practice Step-by-Step Checklist**



**This checklist is designed to be as comprehensive as possible.** There are many steps to success, and with this list, you can check off all your steps as you go to help you stay on track and avoid getting lost in the process.

**My suggestion is to print out this list and begin the creation of your Clinical Binder.** This way, you have a physical representation of the steps you are going to need to and have taken on your journey of creating and building your own private practice.

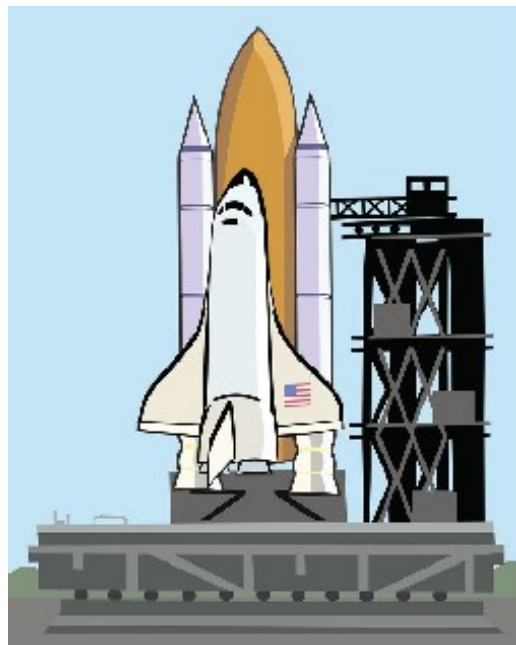
**I also suggest that you print out and save any physical copies you have for the steps you have completed and store them in your Clinical Binder.** This serves as a quick and easy reference for the information contained in the steps. Many of the steps in this process will have confirmation pages, forms or printouts that you will likely need to reference back to in the future, so keeping a copy of them in your Clinical Binder will create a master reference for your practice. We absolutely LOVE our practice's clinical binder and reference it often.

Okay:

# **LET'S GO!**

# Pre-Launch Considerations for Your Practice Now and After Graduation

1. \_\_\_\_ **Decide In-Person, Telehealth or a Mixture of Both**
2. \_\_\_\_ **Decide if you want to be a Solo Practice or if you want to be part of a Group**
  - There are advantages of both, and we can go over this in supervision.
3. \_\_\_\_ **Set an Income Goal**
  - For real. You deliver value and should be paid in proportion.
4. \_\_\_\_ **Decide how many clients you want to see each week.**
  - This is an important standard that allows you to avoid burning out.
5. \_\_\_\_ **Develop your business's policies.**
  - These are your standards, and there is no need to re-invent the wheel.
  - There are samples out on the net, and AI can be a helpful tool for this as well.



# Business Setup and Finances

Why am I seeing this? Well, a private practice is a business, and there are steps to going into business that were not covered in our schooling. This section is dedicated to helping you with these simple but vital steps.

## 1. \_\_\_\_ Obtain an LLC (Limited Liability Company) business license from the State of Michigan.

- <https://www.michigan.gov/lara/bureau-list/cscl/corps/forms/limited-liability-company-forms>
- Choose Form 700. There is a \$50.00 fee.
- Businesses are formed at the state level, so you can check for your business' name availability in Michigan.
- You may want to form a PLLC (Professional Limited Liability Company) after you are fully licensed. We can go over this in supervision.

## 2. \_\_\_\_ Obtain an EIN (Employer Identification Number). This only looks hard. This is through the IRS, and instructions can be found here:

- <https://www.irs.gov/businesses/small-businesses-self-employed/get-an-employer-identification-number>
- This will get you access to a lot of things through your career that would be impossible to access without it. It's also how we get paid if we take insurance.
- It is similar to a Social Security Number, but it applies to your business.
- It is handy to have even if you are not planning to have employees.
- You will need it to open a business bank account, apply for any business licenses and file any tax returns.
- It is an important tool for keeping your business and personal accounts and money separate.
- You simply can't run a legitimate business without it.

## 3. \_\_\_\_ Obtain an NPI (National Provider ID Number)

- We had you do this initially, but I am including it here because it is so important.
- This is how you are recognized as the professional service provider you have worked so, very hard to become.
- You can just check this one off.
- You will want to have a copy of this printed off and in your Clinical Binder.

## Business Setup and Finances, Cont.

### 4. \_\_\_\_ Open a Business Bank Account.

- You will need to complete numbers 1-3 above before setting up this appointment.
- It does take a hot second. I have not had this take less than half an hour to an hour at the bank or credit union.
- This will help keep your business revenues separate from your personal income and will help save a lot of confusion come tax time.
- You can also get a debit card and set up the ability to do transfers and bill payments through this account while keeping your income separate.

### 5. \_\_\_\_ Create a financial tracking system for expenses, revenue and income.

- Your bank or credit union will be able to suggest one that works with their system.
- We use Autobooks as well as relying on the reports generated within our EHR.

### 6. \_\_\_\_ If you are going to be completely independent and not part of a group, like Life's Work Clinic, PLLC, you will need to make sure that you set up services with a credit card processor so that you can take self-pay payments or co-pays.

- While you are with LWC, you will have access to the EHR which has a built-in credit card payment system (Easy Pay).
- There are many out there. For my coaching, I use Stripe or PayPal for international transactions.
- You will have a service fee for every transaction. It pays to shop these around since some may be as high as 4% off every transaction, but if you tell one that you got a better quote, they will often match it or beat it. I would shoot for around the 3% mark.
- Sometimes they will give you a smaller percentage if you have a per transaction fee like \$.20.

## Business Setup and Finances, Cont.

### 7. \_\_\_\_ Decide whether or not you want to accept insurance.

- During your internship, you will be working with LWC as a group, and your sessions will be billed by the practice under my license that is already credentialed with most major insurers in Michigan.
- Some people in large, metropolitan areas can build a private practice on a self-pay model when there are a lot of potential clients and the average income is higher.
- Practices that serve people in rural areas will do better to accept insurance due to the smaller amount of potential clients and the generally lower level of average incomes.
- Ultimately, the decision comes down to a being connected with a larger group, like LWC, where your billing is part of the practice management process, or it will rely on your willingness for (and tolerance for) working with insurance companies or other billing companies. We have done it all three ways at different time in our practice.
- **Just for the Record:** There are realities around insurance that can drive you a bit bonkers. There are politics involved in accepting insurance. They can suddenly reduce your billable amount or withhold payments for extended periods of time. They can also “pull back” money they already paid you if they think there was something wrong. Our records show that this happened to the tune of \$5K with just one of our counselors this year. It’s a roller coaster that got a little better with the ACA, but without a large, wealthy population to pull from, insurance can still be a way to more or less ensure you get paid.
- If you decide to take insurance as a solo practice, then you would need to get credentialed with each individual insurance you want to take. This is a time-consuming and costly process, so you would want to make sure that you picked a good company to do this with. The company we initially went with was nothing but problem after problem, so picking the right credentialing company is really important.



## Forming a Corporation

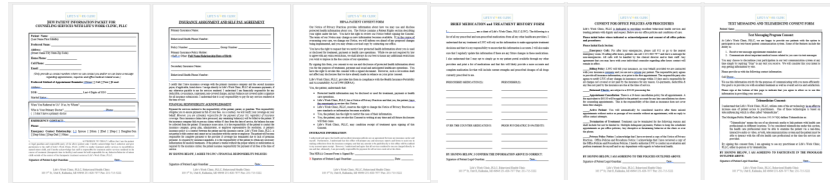
There is a lot of information out there claiming that corporations are not good. It turns out that this could not be further from the truth. Having your own corporation has several out-sized advantages for therapists. In this section, I will go over a few of the basics:

1. First of all, I am not a certified accountant, and I am not giving tax advice. There is no substitute for hiring a qualified CPA who can walk you through all these steps. We have our person, and we rely on him for all our financial advice. I am simply sharing our experiences so that you can avoid several tax pitfalls that we encountered along the way.
2. The highest tax burden falls on the self-employed owner of an LLC. While this is where we started with our business structure, it was not our final destination.
3. One year as a Professional LLC, our tax rate turned out to be 32%. That meant that I gave the government 1/3 of every dollar I made as a therapist! This was, as we say, not ideal, so we did our research and sat down with our CPA and discussed our options.
4. When you form a corporation to oversee your LLC(s), you can set up the bylaws so that the corporation is responsible to pay for all the bills for any LLC you have (“pass through income”) as well as other things like your car, gas, repair costs, health care costs and other types of “lifestyle” expenses. This is taxed at the corporate rate of 21%, and any health care costs are considered “pre-tax”.
5. Once you have spent a year as a C-Corp, you can set up an S-Corp where even more “income” can “pass through” and pay for different things.
6. As the owner of the corporation, you can then pay yourself a salary from the corporation for managing it and overseeing the corporate management of any of your LLC’s. This is how we run ours, and we get to decide how much we get paid and, more or less, what tax rates we fall into through managing this salary.
7. You then become a manager of your corporation instead of an employee of your LLC.

### **If you Want to Form a Corporation, Get a Great CPA and Follow these Steps:**

1. Form your LLC which you would have done in an earlier module.
2. Form your C-Corp (Always at the first of the year since you only have a month and a half at the first of the year to do this. Otherwise, you wait until the following year.)
3. After one year of being a C-Corp, you can then have your CPA file for you to become an S-Corp, and you will be able to benefit fully from “pass through” income.
4. Find more information here: <https://www.northwestregisteredagent.com/corporation/michigan>
5. **Two Great Books: Rich Dad/Poor Dad and Cash Flow Quadrant by Robert Kiyosaki.**

# Clinical Intake Forms and Documentation



## 1. \_\_\_\_ Create intake forms for any type of service you offer.

- While with LWC, you will have access to our forms electronically through our EHR.
- These can be sent electronically to your new clients either through the patient portal or by email. This is client specific and has to do with their level of tech savviness.
- If you are only offering counseling services, you may only end up creating one, single intake form.
- If you start doing assessments, driver's license appeals or other types of services, you might want to create some simple forms for that as well that quickly capture all the information.
- Forms allow you to capture consent to treat and other valuable information like demographic or insurance information.
- We have three sets of forms:
  - Counseling Intake
  - MAT Intake and
  - Psychiatric Intake (We no longer offer psych services.)
- You can feel free to pillage anything you want from my intake paperwork. Nobody is reinventing the wheel here.
- You also want to capture a copy of their insurance card(s) and Driver's License or ID front and back and name and birthdate of the primary insurance policy holder if different from the client (when they are on their parent's or spouse's insurance policy).
- For billing purposes, the information on the back of the insurance card is often very helpful if billing does not go the way it was expected to.

## 2. \_\_\_\_ Create a format for your notes.

- Everyone has their own style of writing notes.
  - Some like the long form.
  - Some like the short form.
  - There is no rule except that you document the person's overall state and, in a general sense, what you talked about.
  - Never forget that client's will often incriminate themselves when talking about drug use, dealing and the sort.
  - Write your note as though it will be read in court.**
- While you are with LWC, you will have access to our format that you can simply choose from a dropdown menu.
- You can also make a copy of your previous note and update what you talked about that was different from this time. This saves a lot of time.



# The Basics of Health Insurance/Payments



If you are planning anything other than a fully, private pay practice, you will need to be well versed on the topic of health insurance. Whether you join a group practice or if you go solo where you do all your own billing, your clients are going to want to access services as affordably as possible, so they will be looking for someone who takes their insurance if they have it.

Insurance is a roller coaster ride at times, but if you are planning to reach rural clients, taking insurance for payment will be a necessity.

This overview is in no way comprehensive. It is intended to bring you up to speed so that you can understand the basic types, come up to speed on the dizzying array of vocabulary associated with insurance and to show you some ways that you can and will need to advocate for your clients.

## Brief Introduction to Health Insurance

### What is Health Insurance?

- **Definition and Purpose:** Health insurance is a contract between an individual or provider and an insurance company that covers medical and mental health expenses. Its purpose is to make healthcare services more affordable and accessible to clients while ensuring providers are compensated for their work.
- **Benefits to Clients and Providers:** Clients gain access to necessary care without overwhelming financial burden, and providers secure a steady stream of clients by accepting insurance plans.

## Types of Health Insurance Plans

### Private Insurance:

- Includes employer-sponsored plans and individual plans purchased through the healthcare marketplace. Often provides comprehensive coverage but varies significantly by policy.
- Examples are Blue Cross Blue Shield, Blue Care Network, Priority Health, Cigna & United Healthcare



# Health Insurance/Payments, Cont.

## Government Programs:

- **Medicaid (State Level):** A federal grant program that provides funding for state programs offering free or low-cost care to low-middle income individuals and families.
- **Medicare( Federal Level):** Federal insurance primarily for individuals aged 65+ or those with certain disabilities who are on Social Security Disability.
- **Tricare (Federal Level):** Health care program for military personnel, retirees, and their families.
- **CHIP (Children's Health Insurance Program: State or Federal Level):** Children eligible for CHIP are in families with incomes too high to qualify for Medicaid, but too low to afford private coverage.
- **Other Types that are Not as Common:**
  - **Auto Insurance:** Covers injuries resulting from car accidents.  
(Pro-Tip) Need referral from Doctor or Primary Care.
  - **Worker's Compensation:** Covers injuries sustained in the workplace.

## Key Insurance Terms and Concepts:

- **Premium:** The monthly cost paid for insurance coverage.
- **Deductible:** The amount a client must pay out-of-pocket before insurance begins covering services.  
**Pro Tip** - Sometimes mental health benefits are not tied to deductible and some times they are.
- **Co-pay and Co-insurance:** Fixed fees or percentage of costs the client pays per visit (We collect these payments during the session, or the client can pay through the Patient Portal.)
- **Out-of-Pocket Maximum:** The most a client will pay in a policy period before insurance covers 100% of services.
- **In-network vs. Out-of-network:** In-network providers have contracted rates with the insurer, while out-of-network providers often require clients to pay more up front in the form of copays or percentages.
- **Explanation of Benefits (EOB):** A detailed statement explaining what services were covered, payment amounts, and client responsibility.

# Health Insurance/Payments, Cont.

## Understanding Coverage

- **Mental Health Parity and Addiction Equity Act (MHPAEA)**

Federal law ensures mental health and substance use services are covered equally to physical health services. Providers should understand how parity laws apply to the insurance plans they accept.

- **What Health Insurance Covers in Mental Health:**

**Therapy Sessions:** Includes individual, family, and group therapy.

**Psychiatric Evaluations:** Assessments to diagnose and plan treatment.

**Telehealth Services:** Increasingly covered for convenience and accessibility.

- **Limitations:** Some plans limit session numbers, require a specific diagnosis to be primary, or impose additional restrictions. Providers must verify specific plan details.

- **Eligibility and Verification**

**Eligibility:** Understanding who qualifies for Medicaid, Medicare, and other programs.

**Verification:** Confirm client coverage before starting services to avoid payment issues. This is why it is so important to capture the insurance information and a copy of the front and back of new client's insurance card prior to your session with them.

## Contracting with Insurance Panels

- **Becoming an In-Network Provider**

- Steps include completing credentialing applications, submitting required documents (license, liability insurance, W-9, etc.), and negotiating reimbursement rates.
- The process times to complete credentialing can vary, (2 - 12 months) so start early and follow up regularly. Don't worry about being a squeaky wheel.
- While it is possible to do the credentialing process yourself. It can be tricky and each insurance requires a different process. It is highly recommended that you pick a reputable company to do this for you. Choose wisely as they are not all created equal.

# Health Insurance/Payments, Cont.

## Pros and Cons of Being In-Network:

- **Benefits:** Access to a broader client base, steady referrals, and higher client affordability.
- **Challenges:** Lower reimbursement rates and added up front administrative responsibilities.

## Out-of-Network Billing:

- Providers can offer superbills for clients to submit to their insurers for reimbursement.
- Discuss payment terms and reimbursement options with clients upfront.
- You may choose to still provide your client with cash rates rather than charging them full price.

## Cash Pay Practice:

- **Benefits:** Simplifies billing, avoids administrative burdens, and ensures full control over fees.
- **Challenges:** May limit access for clients who rely on insurance, and may work best in Metropolitan areas where incomes are typically higher with a larger population to market to.
- **Strategies:** Offer transparent pricing, sliding scales, and payment plans to make services more accessible.

**Pro Tip:** Encourage clients to sign up for the patient portal through the E.H.R. so that they can take responsibility for paying copays or session fees.

## Billing and Claims Management:

### Understanding the Claims Process

- **Steps:** Verify coverage, provide services, document sessions, submit claims, receive EOBs, and track payments.
- **Common Denials:** Address issues such as missing information, coding errors, or lack of/need for prior authorization.

# Health Insurance/Payments, Cont.

## Electronic Health Records (EHR) and Billing Software:

- EHR systems can often (but certainly not every time) streamline billing, scheduling, and documentation. Examples: SimplePractice, TherapyNotes, and TheraNest.
- Life's Work Clinic uses Qualifacts/InSync, but we also used to use Practice Fusion.

## Payment Processing:

- **ERA (Electronic Remittance Advice):** Digital explanation of payments.
- **EFT (Electronic Funds Transfer):** Direct deposit of payments.
- **Tracking Payments:** Monitor outstanding balances and follow up with insurance companies on unpaid claims.

## Coding and Documentation:

### Here are some common CPT codes for your reference:

- **Psychotherapy: 90832, 90833, 90834, 90836, 90837, 90838, 90853 (Most Used)**
- **Psychiatric diagnostic evaluation: 90791 (Most Used for Initial Session)**
- **Developmental behavioral screening:** 96127, 96110, 96161
- **Adaptive behavior services:** 97151, 97152, 97153, 97154, 97155, 97156, 97157, 97158
- **Health behavior assessment and intervention:** 96156, 96158, 96159, 96160, 96161, 96164, 96165, 96167, 96168, 96170, 96171
- **Psychoanalysis:** 90845
- **Family psychotherapy:** 90846, 90847 (Actually Pays *Less* than Individual Psychotherapy)
- **Group psychotherapy:** 90853 (This one pays a small amount, but it is scalable.)
- **Interactive complexity add-on:** 90785
- **Psychotherapy for crisis:** 90839
- **Additional 30 minutes of psychotherapy for crisis:** 90840

# Health Insurance/Payments, Cont.

## Navigating Insurance and Billing Challenges in Private Practice:

### Dealing with Insurance Audits

- Audits may request documentation to ensure compliance.
- Keep records organized and accessible to simplify the process (The EHR is sufficient for this.)

### Advocating for Client Coverage:

- Write appeal letters for denied claims.
- Assist clients in understanding their benefits and filing claims.
- Do prior-authorizations as needed

### Balancing Administrative Tasks and Client Care:

- You can use a variety of tools to address billing in your practice.
- You can also consider outsourcing billing to focus more on client care.
- Being part of a group practice can also limit the amount of time spent on claims and other administrative tasks.

**Pro Tip:** The amount of time you spend on documentation should be about 10% of your total time spent at the office. Administrative tasks can take a lot longer, so if you don't actually love administrative tasks, then consider outsourcing this.

**And there you have it...just enough information to be dangerous! The bottom line is that getting paid is the bottom line. Understanding this is vitally important for the long-term viability of your practice. For many, this holds little interest, and they would do well in a group practice setting. For others, the details are where it's at, and they may be perfect for being a solo practice. It's entirely up to you as a clinician how much you want to interact with the billing process. There are more than**

# Marketing Your Practice

There are a lot of ways to market your practice. You can use anything from direct, cold-calling to other service providers and agencies to online posting and advertising options. Ultimately, the ways that you market your practice are going to be as unique as you are, so the list below is not either exhaustive or inclusive of everything you can do to get new clients.

There is one thing to keep in mind, and that is that after a few years, you are going to want your practice to be 25-50% referrals from former or current clients. As of this writing, I have three clients from the same family and another mother and daughter I see just referred one of the daughter's friends. If you are delivering a unicorn, you can expect that your clients should be referring family and friends, and this brings your practice to a new level of satisfaction.

Below are a sample of many different ways that people use to get new clients through the door along with the Pros and Cons of each approach:

1. **Create a Professional Website (After Graduation)**
  - **Reason:** A website is a central hub for clients to learn about services, credentials, therapeutic approach and contact information.
  - **Pros:** Enhances credibility, available 24/7, and can include online scheduling or telehealth options.
  - **Cons:** Requires upfront investment and regular updates to stay relevant.
  - **Pro Tip:** Build your website to the point of launching BEFORE you pay for a subscription to the builder (Wix.com for example). This will save you a bunch of money and take the pressure off.
  - **Pro Tip:** Your website can also be a place to grab emails to build an email list.
2. **Optimize for Search Engines (SEO) for your Website**
  - **Reason:** Helps potential clients find your practice when searching online for similar services.
  - **Pros:** Cost-effective over time and increases website visibility.
  - **Cons:** Time-consuming and may require hiring an SEO professional.
3. **Leverage Social Media Platforms**
  - **Reason:** Provides a space to share content, interact with potential clients, and increase visibility.
  - **Pros:** Builds community engagement and allows for creative marketing.
  - **Cons:** Can be time-intensive and requires consistent posting.
4. **List on Online Directories (like [psychologytoday.com](http://psychologytoday.com) or [mentalhealthmatch.com](http://mentalhealthmatch.com))**
  - **Reason:** Helps clients searching for therapists in their area.
  - **Pros:** Increases visibility and is often free or low-cost.
  - **Cons:** Competition can be high on these platforms.



## Marketing Your Practice, Cont.

### 5. Offer Free Workshops in your Community or Online through Webinars

- **Reason:** Showcases expertise and builds trust with the community.
- **Pros:** Builds credibility and allows for direct interaction with potential clients.
- **Cons:** Requires planning and can be resource-intensive.

### 6. Network with Other Professionals

- **Reason:** Builds referral sources through relationships with doctors, schools, and other therapists.
- **Pros:** Low-cost and effective for long-term client acquisition.
- **Cons:** Takes time to establish meaningful relationships.
- **Pro Tip:** For example, if you like working with adults, consider collaborating with a child therapist in your area. This way, if you don't want to work with minors, you have someone to refer to, and they have someone to refer the parents or other family members to as well.

### 7. Collaborating with Community Organizations and Agencies (“cold-calling”)

- **Reason:** Engages with local groups and service providers to provide value and increase exposure.
- **Pros:** Builds goodwill and connects with others who are working with your client base.
- **Cons:** Requires “cold-calling” and may not quickly lead to new clients.

### 8. Use Google Ads or Social Media Advertising

- **Reason:** Targets specific demographics to promote services.
- **Pros:** Immediate visibility and customizable targeting options.
- **Cons:** Can be expensive and requires ongoing management.

### 9. Start a Blog

- **Reason:** Provides valuable content and establishes expertise.
- **Pros:** Enhances SEO and builds trust over time and can leverage AI.
- **Cons:** Time-intensive (not so much if you leverage AI) and requires consistent effort.
- **Pro Tip:** You can host your blog on your own website. This allows you to talk about content that might not always be in fashion without getting de-platformed.

### 10. Send a Regular Email Newsletter

- **Reason:** Keeps your practice top-of-mind for subscribers.
- **Pros:** Cost-effective and builds relationships with potential clients.
- **Cons:** Requires an email list and regular content creation.
- **Pro Tip:** Creating an email list is a powerful tool that can be used later on when you want to promote affiliate products or market a training.

## Marketing Your Practice, Cont.

### 11. Participate in Local Events or Health Fairs

- **Reason:** Connects directly with potential clients and raises awareness.
- **Pros:** Builds face-to-face relationships and fosters community presence.
- **Cons:** Can be time-consuming and may have costs associated.
- **Pro Tip:** Branding and staying on a niche message is the key to this type of audience. You can also use these local events to network with other professionals for referrals.

### 12. Use Testimonials and Reviews

- **Reason:** Builds trust and social proof for prospective clients.
- **Pros:** High impact on credibility and conversions.
- **Cons:** Requires client permission and may not be appropriate in all cases.
- **Pro Tip:** Use initials only and only if they give you permission or nothing potentially identifying is in the testimonial. Also, use them sparingly and only to accent your niche.
- **Pro Tip:** General testimonials such as “Rachel really helped me a lot!” don’t accomplish anything if they don’t point to your niches.

### 13. Create Educational Content (e.g., Videos or Infographics)

- **Reason:** Engages clients visually and showcases expertise.
- **Pros:** Shareable content that reaches a broader audience.
- **Cons:** Requires tools, skills, or hiring professionals.
- **Pro Tip:** People love free things. A simple list of things to consider or do will create the impression of getting something of value for free while creating the desire for more information/training or services.

### 14. Partner with Schools or Universities

- **Reason:** Offers services to students and staff who may need counseling.
- **Pros:** Builds long-term referral relationships.
- **Cons:** Requires persistent outreach and alignment with institutional policies.
- **This one is Magnificent!**

### 15. Utilize Telehealth Services

- **Reason:** Expands client reach beyond your immediate area.
- **Pros:** Increases accessibility and convenience for clients.
- **Cons:** Requires secure system and some hardware like a decent camera or mic.

## Marketing Your Practice, Cont.

### 16. Develop a Referral Program

- **Reason:** Encourages current clients or colleagues to refer new clients.
- **Pros:** Cost-effective and leverages existing relationships.
- **Cons:** May not yield immediate results.
- **Pro Tip:** As I mentioned earlier, referrals are a high-ticket item. Treat them as such. Don't be afraid to ask for any referrals as your clients will be talking about people in their lives who might need your assistance.

### 17. Join Professional Associations (Such as the NASW)

- **Reason:** Provides access to a network of professionals and potential referrals.
- **Pros:** Enhances credibility and offers continuing education opportunities.
- **Cons:** Membership fees and time commitment for active participation.

### 18. Offer Sliding Scale Fees

- **Reason:** Makes services accessible to a broader demographic.
- **Pros:** Attracts clients who may not otherwise afford counseling.
- **Cons:** May impact overall revenue and require careful financial planning.
- **Pro Tip:** In order to manage a sliding fee scale, you must keep the client's annual income updated in the EHR. If not, they will suddenly have a large bill that does not make any sense. Trust me, I have struggled with this one myself.

### 19. Publish an E-Book or Guide

- **Reason:** Shares expertise and offers value to potential clients.
- **Pros:** Positions you as an authority and can generate passive leads.
- **Cons:** Time-consuming to create and market effectively.

### 20. Participate in Podcasts (OPP-Other People's Platforms) or Start Your Own

- **Reason:** Shares your insights and reaches an engaged audience.
- **Pros:** Builds authority and allows for a personal connection with listeners.
- **Cons:** Requires equipment and consistent content creation.

### 21. Distribute Flyers or Brochures in Relevant Locations

- **Reason:** Provides tangible information to people in need of counseling services.
- **Pros:** Cost-effective and can target specific audiences (e.g., gyms, coffee shops).
- **Cons:** May not always reach the intended audience.

## Marketing Your Practice, Cont.

### 22. Write for Local Newspapers or Magazines

- **Reason:** Shares expertise with the community and raises awareness.
- **Pros:** Increases credibility and visibility.
- **Cons:** Requires writing skills and outreach to editors.
- **I do this one and am working to expanding this with all the content I am creating.**
- **Pro Tip:** You can create your content as you go. One article can be used 100 different times with different publications, so remember that you are creating content that can last the length of your career.

### 23. Collaborate with Influencers in Mental Health (OPP-Other People's Platforms)

- **Reason:** Reaches a broader audience through established trust with influencers' followers.
- **Pros:** High visibility and targeted exposure.
- **Cons:** May require financial investment or time to build relationships.

### 24. Create a YouTube Channel

- **Reason:** Offers educational or therapeutic content to attract potential clients.
- **Pros:** Builds a personal brand and long-term visibility.
- **Cons:** Requires video production skills and consistency.

### 25. Provide Corporate Wellness Programs

- **Reason:** Offers services to employees, a group often seeking mental health support.
- **Pros:** Builds relationships with companies and steady referral sources.
- **Cons:** Can be time-intensive and require customized/niche solutions.

### 26. Engage in Public Speaking Events

- **Reason:** Showcases expertise and connects with a live audience.
- **Pros:** Builds trust and personal connections.
- **Cons:** May require public speaking skills and preparation time.

### 27. Develop Partnerships with Local Gyms or Wellness Centers

- **Reason:** Targets clients interested in holistic health solutions.
- **Pros:** Shared audience with similar values.
- **Cons:** Requires ongoing collaboration and clear terms.

### 28. Offer Live or Pre-Recorded, Online Courses or Webinars

- **Reason:** Provides accessible mental health education while generating passive income.
- **Pros:** Positions you as an expert and attracts potential clients.
- **Cons:** Requires planning, recording, and marketing.

### 29. Host Q&A Sessions Live on Social Media

- **Reason:** Engages directly with potential clients and addresses their questions.
- **Pros:** Builds trust and humanizes your brand.
- **Cons:** Requires confidence in public interaction and consistent engagement.

### 30. Provide Free Resources (e.g., Printable Worksheets)

- **Reason:** Offers value and builds goodwill with potential clients.
- **Pros:** Attracts website traffic and email subscribers.
- **Cons:** Requires effort to create and distribute.
- **Pro Tip:** These can be available to download for free on your website as a value added service.

### 31. Engage in Volunteer Work or Pro Bono Services

- **Reason:** Gives back to the community while raising awareness about your practice.
- **Pros:** Builds goodwill and enhances your reputation.
- **Cons:** Time-intensive and doesn't directly generate revenue.
- **Pro Tip:** Consider volunteering for organizations that allied with your niche in some way.

### 32. Offer Group therapy Sessions

- **Reason:** Serves more clients at once while fostering community.
- **Pros:** Cost-effective and beneficial for certain client demographics.
- **Cons:** Requires facilitation skills and may not suit all clients.
- **Pro Tip:** Group therapy sessions lend themselves to your niche and should be oriented that way in to increase the potential value to your clients.

### 33. Join Local Meetups or Professional Groups

- **Reason:** Builds connections with like-minded professionals and potential clients.
- **Pros:** Increases networking opportunities and local visibility.
- **Cons:** May require membership fees or consistent participation.

### 34. Run Targeted Campaigns for Specific Demographics

- **Reason:** Tailors messaging to resonate with niche audiences (e.g., veterans, LGBTQ+).
- **Pros:** Increases relevance and connection with specific groups.
- **Cons:** Requires research and careful execution to avoid alienation.

# **Marketing Your Practice, Cont.**

## **Creating a Therapist Bio**

**Few tools are as easy to use as a Therapist Bio. When a cold-call stalls, you can send your bio. When they want to learn more about you, you can send your bio. Basically, this is a document that can get some traction for you. If you are lucky enough to call or meet with an agency that has a Community Directory, then your bio sheet will be perfect for placement in this.**

**Below are some things to keep in mind:**

### **1. Understand your Audience:**

- The first step in drafting an engaging bio is understanding your audience and their needs. Consider the types of clients you want to attract and tailor your message accordingly.
- Words are powerful, so don't over-use them. Use simple words unless you are trying to recruit other therapists and psychiatrists to your practice.

### **2. Tell your Story:**

- Be concise. Yes, this is a bio, but people don't need to know much to relate.
- Less is more.

### **3. Highlight your Areas of Treatment:**

- Don't over-think this one. Most people are struggling with anxiety and depression or struggling with their relationships.
- Once they see this, they are likely to see you as a good option.



## **Marketing Your Practice, Cont.**

### **4. Include the Insurances you Take:**


- While this may seem like a superficial detail, some people will call and tell you that they have had a really hard time finding someone who takes their insurance.
- Once they know you can take it, they are more likely to give you a call.

### **5. Include a Call-to-Action:**

- While this may seem cheeky and gimmicky, people respond positively to being led along a safe path.
- Put this down in the bottom right corner since this will be the last place that their eyes go.

**I have included a sample of a bio sheet that I made up. I created this on Canva.com in just under half an hour. I used an already existing template and just changed the content and colors. Once again, there is no need to reinvent the wheel, and, if you don't already have one, a paid subscription to Canva is a wonderful tool to have at your disposal that has thousands of different templates for a whole host of marketing and design tools.**

# Marketing Your Practice, Cont.





## ADAM DEVANEY

### LMSW-CLINICAL, CECF

#### PSYCHOTHERAPIST

As the Founder of Life's Work Clinic, I am passionate about working with people to find emotional balance. It is my mission to help people overcome their mental health challenges as a team.

 +123-620-7977
  adam@lifesworkclinic.com

### EDUCATION

Master of Social Work	2011
GRAND VALLEY STATE UNIVERSITY	
Bachelor of Science	2004
CENTRAL MICHIGAN UNIVERSITY	

### AREAS OF PRACTICE:

- Addiction Medicine and Recovery
- Anxiety/Panic Attacks
- Trauma/PTSD
- Phobias
- Career & Personal Development

### INSURANCES:

- Life's Work Clinic, PLLC, Accepts Most Major Insurances in Michigan including:
- Medicaid/Medicare
- Most Private Insurances

### COUNSELING APPROACH:

Life can be challenging, and none of us need pesky issues like anxiety, depression and trauma to get in the way. When we address the core causes of these directly, our life improves, our relationships improve and our careers improve.

Letting go of guilt, shame and resentment helps us to clean up our thoughts, our emotions and even our bodies. Together we can accomplish this over a relatively short time.

### CLIENTS SERVED:

- Everyone and
- Without
- Everbody
- Judgement

**GETTING HELP SHOULD BE SIMPLE.  
CALL TODAY: 231-620-7977**

# Technology and Compliance with Privacy Laws

## 1. \_\_\_\_ Set up an Electronic Health Record (EHR) system.

- This is your workhorse for everything from intakes, clinical planning, encounter notes, billing, revenue management and telehealth.
- While with LWC, a group practice model, you will be using Qualifacts/InSync. It has all the functionality that comes in an EHR, and you will be fully trained on this early in your internship.
- There are many to choose from ranging from intuitive to downright frustrating.
- Most of the time, you get what you pay for.
- Customer service is a BIG DEAL in choosing an EHR system since any time something goes wrong or you get confused, you will need a support person to assist you.

## 2. \_\_\_\_ Obtain a secure email system.

- Google Workspace is sufficient for this.
- During your internship, you can use your university email. These are considered secure.
- After your internship, it is more professional to have an email address that reflects your brand like: [adam@lifesworkclinic.com](mailto:adam@lifesworkclinic.com).
- Nothing says that you skimped on the important stuff like having a secure email address like sending an email from [counselorkim@yahoo.com](mailto:counselorkim@yahoo.com).

## 3. Consider Obtaining a Digital Fax, or Just Get Used to Using Secure Email.

- While with LWC, you will have access to our fax at 231-715-3222 through the EHR.
- Digital Faxes save bunches of money if you are not planning to have a landline in your office. Landlines are certainly an added expense.
- Most therapists these days simply use their cell phones for their practice. If you want, you can get a separate number on the same cell phone or use an app like Version's OneTalk to separate your practice from your personal calls while using the same phone. We have also used separate phones at times.
- Digital faxes typically run around \$25 per month, but some have data limits.

## Technology and Compliance with Privacy Laws, Cont.

### 4.\_\_\_\_ Obtain a HIPAA secure video conferencing platform.

- While with LWC, you will have access to secure Zoom through the EHR.
- This is a BIG detail in choosing an EHR system since it is a lot simpler to use for telehealth appointments when it is integrated into your EHR. You should be able to go right from your scheduled appointment into the telehealth room.
- If decide to use a telehealth system that is outside your EHR, be sure to choose one with End-to-End Encryption like Zoom.
- Zoom does have a free version, but you will be limited to only 40-minute calls, and this simply won't work for your 45-60 min appointments. It's best just to pay for it if you are going to offer telehealth services outside of a group.



## For these and Many Other Reasons, Insurance is Mandatory

### 1.\_\_\_\_ Obtain Practice Liability Insurance

- The NASW has very competitive rates whether you are a member or not.
- Most practice insurance policies do cover telehealth as well as in-person services.
- This is separate from any liability insurance you may need for any physical location you might have in the future. For this, I recommend you speak to your auto insurance company to see if this can simply be an add-on...ask for the multi-policy discount!

# Getting Licensed, Supervision and Navigating LARA

After all the schooling, the internship and sweat and tears, once you have graduated, it's time to get your limited license and get after it. Having already began the process of creating your private practice during your internship, you will have a distinct advantage over others who spent their time at an agency, but there are still a bunch of steps to take. It's complicated enough to warrant its own checklist.

**Keep in mind that in Michigan, you cannot practice after graduation until you have your limited license. This means that you will not be able to see your clients during this time. I have written this to streamline this process and time-collapse this as much as possible. You will want to let your clients know this in advance.**

While Module Eight only applies after you have graduated, it is as important as anything else you are going to learn in your internship. The steps are as follows:

**Degree ->> LLMSW ->> LMSW-Clinical**

1. **Obtain your MSW degree from an accredited school of social work.**
  - Easier said than done, but truth is that you can't do the other licensing steps until you have completed this.
  - Congrats! By the time you are looking back at this, you will have graduated. Likely you watched over the course of your degree as people dropped out of the program along the way. I believe it was at least 30% who did not complete the program I was in (I was also the only male in the cohort after the first semester!)
2. **Before graduation, complete the following required trainings** if your program did not set you up to have these credits before you graduated:
  - 2 Hours on Implicit Bias
  - Human Trafficking Training (This one was fascinating and eye-opening!)
3. **Apply for your Limited License through LARA.**
  - Here is a handy dandy link that takes you from your checklist to another checklist: <https://www.michigan.gov/lara/bureau-list/bpl/miplus-assistant>
  - You will start by registering with MiPLUS.
  - The follow this link to download a form that is designed to help you walk through the process of applying for your license through MiPLUS:
  - <https://www.michigan.gov/lara/-/media/Project/Websites/lara/bpl/MiPLUS/Apply-for-First-License.pdf?rev=09bf208f8e7a4b599c5150fddb2a7fdd&hash=4FBE76064773453AC8340EF4B0AA5E8D>
  - The application costs \$44 as of this writing.

## Getting Licensed, Supervision and Navigating LARA Cont.

### 3. \_\_\_\_ Cont.

- Once you apply, you will be directed to get fingerprinted as well as giving information on how and weHRe to do this.
- You will also be directed to get a criminal background check. I am currently checking into the length of time one is good for...in case you have already had one recently.

### 4. \_\_\_\_ **Request your University Send LARA your Official Transcripts:** Arrange for your school to send your final, official transcripts directly to the Bureau of Professional Licensing via email at [bpldata@michigan.gov](mailto:bpldata@michigan.gov) or by mail to PO Box 30670, Lansing, MI 48909.

- It is up to you to request that the transcript be sent to LARA.
- Contact your Social Work Department to start this process.
- Be sure to ask your department leadership what the earliest time is that you can request your transcripts be sent.

### 5. \_\_\_\_ **Await License Approval:**

- Once all the requested materials are sent off to LARA and the background check is complete, the Michigan Board of Social Work will review your application.
- Upon approval, you will receive your Limited Master's Social Work License.
- This will allow you to resume working with your clients and begin accumulating clinical work experience hours under a supervisor.

### 6. \_\_\_\_ **Choose a Specialty**

- If you ever want to practice independently as a therapist and not have to bill under another, higher license, you will need a Clinical specialty.
- If you choose Macro, you will always need a clinical licensee to sign off on your therapy notes, to provide billing services and to oversee your work.
- Let's call this less than ideal. In the long-run, you will want a Clinical specialty.



# Getting Licensed, Supervision and Navigating LARA Cont.

## 7. \_\_\_\_ Find a Supervisor

- Your supervisor will need to be a fully licensed masters level social worker in your specialty with at least 2 years of clinical experience post full licensure.
- They will need to supervise you weekly for an hour or so.
- They will not need any direct observation of your work. Think of them as a clinical sounding board and mentor.

## 8. \_\_\_\_ Complete 4,000 Clinical Hours

- These hours will need to be completed within a minimum of 2 years and a maximum of 6 years.
- Social workers are known for being hard-working people, and I believe this is why they created the minimum of 2 years...so none of us just work 70 hours a week and get it done in less time!

## 3. \_\_\_\_ Take the Exam

- You will be required to take and pass the ASWB (Association of Social Work Boards) Exam.
- There are 2 versions of the exam: The Clinical Exam and the Macro Exam
- If you want to be independent (solo), you will want to take the Clinical Exam
- Find a testing location that works for you (There are a couple in the state.)
- Register for the ASWB exam online.
- Exam Fees range from \$230-\$260.
- You will want to find some study materials. There are classes you can take, and I recommend that you at least use materials that will help you understand the structure of the exam questions and the specific ways that they design questions to trip you up.
- You can take your exam anytime during or after your 4,000 hours, and it is recommended that you take it as soon as possible after you graduate while things are still fresh. Research has shown that the longer one is in practice, the harder it is to take the test. Really makes you wonder about how that one works...!

# **Getting Licensed, Supervision and Navigating LARA Cont. The End Goal: Becoming an LMSW-Clinical!**

**Once you have passed your exam:**

**1. \_\_\_\_ Complete Trainings:**

- 2 Hours on Implicit Bias
- Human Trafficking Training
- Any other required CEU's.

**2. \_\_\_\_ Submit LMSW Application**

- Submit Application through your MiPlus Portal.
- Pay application fee of around \$44.

**3. \_\_\_\_ Provide Documentation**

- Supervision Verification Form
- Exam Scores
- Criminal Background Check if not submitted during LLMSW application

**4. \_\_\_\_ LICENSE APPROVAL!**

- Once the Board of Social Work reviews your application, you will receive notification of your LMSW-Clinical license approval and will receive your license in the mail.

**Congratulations! At this point, you have the highest license in your field, and you are fully able to practice independently for the rest of your career. Sure, you will have to do CEU's and reapply regularly, but for billing purposes, you will be equivalent to a PhD in psychology! It's an incredible moment. All that work. All the skills you learned along the way. All the people you have already helped and now the all the people you are going to help for the rest of your career...**

**The sky is the limit!**

# Your Physical, In-Person Office Setup

## 1. \_\_\_\_ Find a secure and private office space that is within your budget.

- Eventually, you are likely going to want to meet with people in-person. This is the best even though telehealth is really cool.
- You want a place that is private. When you are looking at the location, if you can hear people in the next room, that might not be the best place.
- Consider soundproofing like noise makers outside your door or wall sound dampening materials.
- I have Pandora playing in my lobby, and even though some of my clients don't necessarily always share my taste in music (mostly country out here in rural America!), they appreciate the fact that they could not hear me talking with my last client. That means that nobody can hear them when they talk with me. It takes some time to find the optimal volume to cover everything...not too loud/not too soft.
- You want your office location to be lockable when you are not there.
- You want to consider that you are giving up a big chunk of your revenue for this space, so a shared space is a nice way to start out. You also typically get a lobby this way!
- Try to keep your expenses down to less than 50% of your revenue...aim for 35%.
- Think about it this way, if you are planning to make \$7K per month, you want to aim for no more than \$700 per month for your office space so that if your other expenses amount to only 25% of revenue, you can hit a simple and efficient 35%.
- A high-end and attractive office is nice from a professional look standpoint, but with a little decorating and adding your own personal touch, just about any room that is 8x10 and soundproof with access to a lobby and bathroom will do.
- Consider accessibility, parking and location as well. People have to be able to find you.

## 2. \_\_\_\_ Ensure you have comfortable furniture in your office.

- Let's face it, your clients are going to be sitting in your office for up to an hour. They need to be physically comfortable.
- PRO TIP: Have two different chairs in your office with arm rests. Even with two chairs to choose from, most clients always sit in the same chair session after session.
- Many therapists choose to have a couch for their clients. This is traditional, and I say, whatever floats your boat. Since I do individual therapy, the chairs work best for me.
- Also, you are going to be sitting there for 6-9 hours a day as well, so invest in a comfortable chair for yourself. Being as short as I am, I have used the same old chair for years, because it is the only one I have found that is at a comfortable height. Invest in your chair!



# Your Physical, In-Person Office Setup, Cont.

## 3. \_\_\_\_ Ensure a comfortable environment for your clients.

- Clients generally do not like clinical environments. They need to feel comfortable in the space as well.
- If you have light coming in a window, make sure that it is not in the eyes of your client. I have this issue, but I solved it by simply having two different chairs for my clients so that if they need to they can just move away from the light coming through my awesome south facing window.
- Clients like plants. Okay, with my 50+ plants in my office, I might have taken this juuuust a bit far, but my clients quite often express how grateful they are for the plants as it takes the “clinical” edge off the space.
- Also, consider simple tapestries or art.
- PRO TIP: Your Background is Important. This is true for telehealth as well as in-person. Choose a background that is soothing. Be deliberate about what your client sees in your therapeutic environment when they are talking with you. I have a nature scene on a large tapestry behind me. My clients tell me that they find it soothing.
- If you are meeting via telehealth, consider a virtual background image instead of, say, your office or bedroom. Most platforms allow you to upload your own images, so get creative.

## 4. \_\_\_\_ Obtain a high quality camera and microphone for telehealth.

- While all laptops and phones come with microphones and cameras, they are not ideal for telehealth sessions.
- Even a \$50 camera typically has a better quality mic and camera than a laptop. You owe it to your client’s to be visually clear and easily understood without static.
- I love my Insta 360 Link camera. It tracks me, has a great built-in mic and has crystal clear video. It was an investment, but, of course, that was a write off!
- Consider getting a small ring light if the lighting in your office is too low for good quality video.

\*Don’t forget to be deliberate about what you are looking at for 6-9 hours!\*



## Your Physical, In-Person Office Setup, Cont.

5. \_\_\_\_ Obtain a locked cabinet or file for any confidential documents and for storage of any cash or checks.
- This also applies to the **Technology and Compliance with Privacy Laws** section of this training.
  - Especially if you are sharing space with others, you want all documents and money in a safe and secure location where only you have access.
6. \_\_\_\_ Gather any office supplies you might need.
- From office paper, pens and those amazing little sticky notes, everyone has their own very favorite office supplies.
  - **PRO TIP:** If, in your travels, you come across a business that has some nice, branded pens, consider asking them for a dozen. We never run out of our credit union's pens. They are not only nice pens, but they are free and abundant. Thinking with a mindset like this can be a big help in the beginning.
  - We actually found a bank location that was going out of business, and they had, like, 15 reams of legal length paper. We took it all, and we had a local copy company cut them to standard office paper size. We used this paper for about 3 years!
  - We also scored all our filing cabinets from this liquidation as well...all for FREE!
7. \_\_\_\_ Consider obtaining a hot and cold water station as well as a coffee station.
- This can be really nice for having clean water, making coffee or having a cup of tea while at the office.
  - You can also offer water to your clients. Even if they don't take you up on your offer, they will appreciate the gesture.
  - I occasionally will offer a cup of tea or coffee to my clients, and each and every time I do (I use my intuition and powers of observation to know when to offer it.), my clients delight in the offer.
  - Places like Costco can fill you up with these supplies for a year or more!

