THE PRACTICE PAPER · FREE RESOURCE

The Private Practice Starter Checklist

Twenty items that decide whether a new practice opens cleanly or spends its first year rebuilding the same paperwork. Tick what applies to you and cross out the rest permanently — a checklist you finish beats a checklist that is complete.

Legal and money

☐ Licence or registration current, renewal date in the calendar

☐ Business structure decided — sole practitioner or company

☐ Business bank account open, separate from personal

☐ Professional liability insurance in force — check the limit, not just the price

☐ Payment method chosen: card, bank transfer, or both

Clinical footprint

☐ Informed consent drafted in plain language, ready for local review

☐ Practice policies written: hours, contact between sessions, cancellation, late fees

☐ Intake questionnaire drafted — only what you will read before session one

☐ Fee agreement and financial policy drafted

☐ Sliding-scale policy decided before anyone asks for a discount

☐ Release of information template ready

Visibility

☐ One-page referral sheet written: what you treat, who you treat, how to reach you

☐ Directory profiles created (Psychology Today plus at least two others)

☐ Google Business Profile created and every field filled

☐ One social channel chosen — not four

Operations

☐ Phone answered professionally, or voicemail script written

☐ Supervision or consultation arrangement confirmed and scheduled

☐ Capacity arithmetic done: sessions per week you can hold for a year

☐ Break-even fee calculated, written down, and the date of the next review in the calendar

☐ Website deliberately deferred until a client asks for it

The two items people skip, and regret. The break-even fee and the cancellation policy. Both feel like paperwork; both decide whether the practice makes money and whether your Fridays stay yours.

Five things new practices waste money on: a website before the first client, an EHR before the fifth, a 40-page intake packet nobody reads, a logo, and ads before referrals are exhausted.

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