PRINTABLE CHECKLIST

The Private Practice Setup Checklist

The business side of a practice — organized before it gets busy.

◆ PRINT IT · CHECK IT OFF · BREATHE ◆

Business foundations

The structure everything else sits on.

- [ ] **Choose a business structure.** Sole proprietorship, LLC, or a professional entity.
- [ ] **Get a tax ID and register your business.** As required where you practice.
- [ ] **Open a separate business bank account.** Keep practice money separate from day one.
- [ ] **Get professional liability insurance.** And check whether you need general liability too.
- [ ] **Get an NPI number if you'll bill insurance.**

Licensing and continuing education

Renewals come around just rarely enough to forget.

- [ ] **Record your license number and renewal date.** For every state you're licensed in.
- [ ] **Check your board's continuing education requirements.** Total hours and any required topics.
- [ ] **Log CEU hours as you earn them.** Date, provider, hours, topic.
- [ ] **Keep the certificates.** Boards may audit.
- [ ] **Check telehealth rules if you see clients across state lines.** Rules often depend on where the client is located.

NOTES

Client paperwork

Prepare it once, review it yearly.

- [ ] **Informed consent and practice policies.** Fees, cancellations, communication, emergencies.
- [ ] **A privacy notice.** Where applicable to your practice.
- [ ] **Intake forms.** Demographics, history, emergency contact.
- [ ] **Release-of-information forms.**
- [ ] **A good-faith estimate template if required.** Often relevant for self-pay clients.

Records and documentation

Decide the system before your first client.

- [ ] **Choose your note format.** SOAP, DAP or BIRP.
- [ ] **Decide where records will live.** An EHR or another secure system.
- [ ] **Know your record retention requirements.** They vary by state and license.
- [ ] **Use coded identifiers in your own working tools.** Initials or a client ID instead of full names.
- [ ] **Plan for what happens to records if you can't practice.** Some boards require a professional will or records custodian.

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Fees and billing

Know what's owed, by whom, and when.

- [ ] **Set your fee schedule.** Including any sliding scale.
- [ ] **Decide on payers.** Self-pay, insurance panels, or both.
- [ ] **Choose a way to take payments.**
- [ ] **Track every session's fee and status.** Paid, unpaid, submitted.
- [ ] **Set aside money for taxes.** An accountant can help you estimate.

A weekly and yearly routine

Small, regular admin beats a backlog.

- [ ] **Weekly: finish notes and check unpaid sessions.**
- [ ] **Weekly: look at next week's caseload.**
- [ ] **Monthly: review income and expenses.**
- [ ] **Yearly: review your paperwork and policies.** And your CEU progress toward renewal.
- [ ] **Yearly: check your insurance coverage.**

> **If you take one thing from this checklist:** put your license renewal date and CEU progress where you'll see them every week. It is the one admin deadline that can stop a practice, and it arrives just rarely enough to be forgotten.

> **Please note:** This is general practice-administration information, not legal, clinical, tax or compliance advice. Check your state licensing board, professional association and payer contracts for the rules that apply to you, and consult an attorney or accountant where needed.

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WHEN PAPER STOPS BEING ENOUGH

This checklist can't count down to renewal.

Paper is a good start for setup. It is harder to keep CEU hours totaled, unpaid sessions visible, and a renewal countdown in front of you every week.

The MDRN Therapist Practice Planner

Note templates in SOAP, DAP or BIRP, a coded client roster, a CEU and license tracker, and a billing ledger. One private file with encrypted backups. Not an EHR.

mdrn-milestone-website.vercel.app/planners/therapist-practice.html

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