



# Checklist for Starting a Private Practice

The following steps are the essential actions you need to take to establish your own private practice. Follow this list as you move through your journey of setting up your practice.

Gather information and consult with others

Ensure that you are allowed to start a private practice

Ensure your NPI and state licensure are currently in good standing

Estimate your startup costs and start saving

Review your finances and determine what you can make work

Select a business entity

Pick an available business name and register the business

Get an employer identification number (EIN)

Determine your practice location

Obtain any relevant business licenses

Ensure you have the proper insurance

Consider a PO box

Determine your payment sources

Apply for credentialing with insurance companies

Set your private pay rate

Set up a HIPAA-compliant email and phone line

Set up a business bank account

Set up an accounting system

Create an initial marketing plan

Secure an office and set up your workspace

Set up an electronic health record (EHR)

Buy your domain name and start setting up a website

Research and get familiar with your local and state laws

Determine your practice policies and create your paperwork

Connect your EHR and payment methods to your bank account

Set up online directory profiles

Establish other avenues of marketing

Develop your initial contact and intake process

Start seeing clients