Introduction



The world needs all the help it can get right now. Yes, there are civilizations, advancements in technology, mind-blowing innovations, and lots more fantastic happenings in the world today, but it's also a known fact there the rate of suicide has increased. People now suffer more from depression, anxiety, and other mental disorders than before.

Sadly, the advancements in technology have also made many become so lonely. There is a decline in human connections as people now mingle more with their technological devices; after all, there is hardly anything you can't do with technology these days.

Needless to say that people of the world could use a friend. A listener. A therapist. Who will not only listen to them unburden their problems but also listen without judging them. Listen with an open mind. And listen to help them get through the challenging period they are in.

Hence, you'd agree becoming a private practice owner is really a service to humanity. Of course, there are juicy extras that come with it, but it's more of a service to the people of the world. Helping people get through difficult periods, one person at a time, is one of the best ways to restore sanity, and healthiness to our world. It's a reputable and lucrative line of profession.

However, as good as that may sound, there is a lot that goes into becoming that person. Becoming a therapist, or a private practice owner does not happen in a day. It requires a lot of

hard work, training, and education. All of which requires consistency, and most importantly, a roadmap.

It's one thing to want to become a therapist, and another thing entirely to understand the steps and processes to accomplishing it. You need help. You need a guide. You need a roadmap. You need someone to hold you by the hand and show you the way.

If that sounds like what you want, you have come to the right place. This guide will provide a stepwise guide to driving your idea from being just an "idea" to reality. We will cover every essential part of becoming a private practice owner, suggest helpful platforms and resources to achieve your goals.

Basically, this course is designed to help you understand exactly how to start your private practice, one that’s custom-designed for your unique gifts, goals, and desires.

Also, this course Workbook is designed to help you to dig deep into your purpose, make decisions with clarity, execute your ideas, and take a committed stand for who you are, what you believe in, and, most importantly, the difference you want to make in people’s lives.

Conclusively, we are rooting for you. Beyond this course, we will be here to provide solutions to whatever challenges you may come across while setting up your private practice.

Module 1: Getting Clarity On Your Idea

A Journey of a thousand miles, they say, begins with a step. So is starting a business or anything in life. You begin with a step, which is your conclusion on your business ideas. Like every other business, starting a Private Therapy Practice begins with deciding to start the practice. It begins with you seeing yourself as a person fit and good enough to run a private practice.

However, it's not going to be a smooth ride. And this is not even about the requirements of the practice yet (we will talk about that soon) but about yourself and your mindset. Your belief about yourself and your practice. As humans, we're primarily controlled by our mindset. Your beliefs become your reality. They say, "Once your mindset changes, every other thing on the outside changes along with it."

Hence, starting a private practice is one step of the journey; constantly working on your limiting beliefs and mindset is another crucial step. As a business person, you will have to do things you

have never done before, which means it will be a learning process. Although this guide will walk you through every step of starting your private practice, you will make mistakes sometimes along the line, which is perfectly OK!

The journey will be challenging and demanding, but if your mindset is right and your beliefs are in tune, you will pick yourself up every time you fall and continue.

More importantly, you will get scared at every point and doubt your potential. This usually happens when there is a change, or you're starting something magnificent like this. You will doubt your strengths and skills. Different negative questions will start popping up in your mind. They include:

- Who am I to do this?
- What will others think?
- Do I have what it takes?
- Am I going to be successful at it?

You may fear that you do not have enough money, time, education, experience, or resources. These are the honest thoughts you will have to get comfortable with and push through when you run a business. This is why you need to ensure your mindset is right. Be sure of the step you're taking, and be ready for all that comes with it.

1.1. Getting Clarity on Your "Why."

Another important thing you have to get absolutely right is your reason for starting a Private Therapy Practice. This is so fundamental to the success of your practice. If you're the type that's going into private therapy practice because it is rewarding or because of the good stuff you have heard about it, you may want to rethink your decision.

Of course, private practice is rewarding, and with this guide, you will find it easy to set up, but that's not all to it. It goes beyond getting a space to meet with clients, booking sessions, and maybe all the glamour that comes with it.

Starting a private practice requires conscious decisions, conclusive deliberations, and loads of decision-making, all spurned from your reasons for diving into private therapy practice. Your reasons for starting a Private Therapy Practice bring clarity. It helps you focus on what matters and keeps you going when your body doesn't feel like it.

You need clarity on the kind of private practice you want, the niche you want to major in, as well as the change you want to make in society. Clarity comes from knowing your "why" for starting a private practice.

There are several reasons people start a private practice, and they are all worthwhile, as long as they keep you motivated to choose the business daily. Some of the most common reasons are;

- To help people get over challenging times
- To make specific changes in your community
- To become a boss and have autonomy over your time and schedules
- To have more time for family
- To make more money, etc.

There are no wrong reasons. Usually, these are part of the reasons for starting a private practice. The most important thing is to ensure your reasons are strong to push you through challenging times. Speaking of challenging times, starting a private therapy practice is no joke. You will have second thoughts and want to pull out of the journey.

Sometimes, you will just feel like staying in bed all day and not doing anything related to your practice. However, if your reasons are refined and clearly defined, you will push yourself through these times with your head held high.

Preferably, you should have like five different reasons for starting a private practice. This is because, sometimes, you will need more than one reason to push through demanding times. For instance, if your reasons for wanting to go into private therapy is the time and schedule autonomy it comes with, this will fade quickly when your practice starts taking much of your time and your schedules start piling up.

The truth is, going into the business will change your life, demand your attention and time, and maybe bring out some parts of you you never knew existed.

To help you understand your reasons for starting this business better, you should provide answers to the following questions:

1. Why do you want to start a private therapy practice?

   (What's your motivation? List as many reasons that come to mind.)

2. What type of lifestyle does this private practice create for you?

   (What do you see daily, monthly, and annually in your business and life?)

3. What's the vision you have for yourself and your family?

   (What does this mean for you and your family?)

4. What's the story behind your private practice?

   (What inspired you to start it? What are you taking a stand for? What do you believe in?)

5. Why does your private practice exist?

   (Whose lives/businesses are going to change as a result of it?)

Ensure you dive deep and provide answers to these questions. When you have the answers, write them on a Post-It Note and stick them around your office and home. The aim of this is to know and create constant reminders of your "why" for doing this.

1.2. Reviewing Professional and State Regulations

In every profession, there are laws and regulations. These laws and regulations guide the practice of this profession. They ensure safe and secure practice for both the practitioners and clients. And in private practice, there are loads of business acumen and regulations to deal with.

For instance, there are basic requirements before you can go into private therapy practice. These include educational requirements, clinical experience, licensing, and loads of others. It is ideal

you do comprehensive research on these requirements and be sure you meet up with the standards.

Also, different states have different regulations for private therapy practice owners. In fact, what's applicable in a particular state may not be applicable in another state. Whatever applies in your state must be thoroughly reviewed and strictly adhered to.

Laws and regulations are some of the not-so-interesting parts of private practice; however, you must get familiar with them. Preferably, you should consult with someone who's already in the profession. This way, you get first-hand information on what you need to know without having to go through much stress on your own. Also, you can visit your local government office to get information about federal and state laws on private therapy practice.

You should also join a community of private therapy practice owners to know more about professional laws and etiquette of private practice. Commit to continuous learning. Read related books, watch videos, and don't stop learning. Apart from preventing you from becoming a violator of any professional or government laws, it is also a way to build competence. When you know your rights very well, you can not be swayed by any Tom, Dick, and Harry.

We will discuss the legal and professional requirements of private practice later in this course.

1.3. Getting Insights From Professionals

Maybe there are literally self-made people. People who rose to the top without the help of anyone. However, this is like a 1-in-a-million occurrence. This is because we all need someone to lean on. We all need help, sometimes. And in business, especially, professional help and insights will go a long way in preventing needless mistakes.

Whatever business you want to go into, some people have done it successfully—people who have made historical marks in that line. Hence, as a newbie, it's only ideal you seek the help of these people. Meet them, either online or in person, and learn from them. Make them your mentors, if possible. Let them groom you and give you timeless pieces of advice.

In business, some hacks and techniques are not open to people in that line of business. There are easy ways to do seemingly difficult things. There are ways to get things done faster and smarter

with massive output. Some of these are not open to people even in that business line. Sadly, you waste loads of resources and time if you don't know them. This is where seeking professional help comes in.

Professionals layout guided paths for you to follow. They show you how to run your practice and get maximum productivity. This way, you understand their process, strategies, and approaches to use in your business. In fact, in some instances, you get referrals from them.

However, there are many Private Therapy Practice owners out there. And it is not advised that you learn from all of them. This is because every private practice owner has something unique about their practice. And although there are general strategies and ways to achieve maximum productivity, some things don't work for everybody. Also, tons of content out there can ironically stunt your growth.

So, you should narrow down to maybe three professionals in your niche that align with your ideas, vision, and values. Make them your go-to persons when you need help. If you can get them to be your mentors, that's great! But if you can't, work with their free content. Watch their videos, read the recommended books and be open to learning. In doing this, your learning becomes coordinated. You're mindful of the type of content you consume.

To help you narrow down on choosing professionals in your niche, you should provide answers to the following questions:

1. What would I like to accomplish in my practice? What's my "big vision" goal? (Dream big here and identify where you'd like to be long-term in your business)?
2. Who has accomplished similar things in their life and practice? Name 1-3 potential mentors.
3. Do these people challenge and inspire you? List 3 specific ways they have inspired or made an impact.
4. Has their content helped you achieve something, realize something, or offer clarity? Give at least one specific answer below.

Once you have identified three professionals you would like to learn from and provide answers to other questions, visit their website and learn more about them. If you can afford their paid content, kindly do. Sign up for their newsletters, and make it a point to utilize their free and paid content. The best thing you can do for your business is to learn from those who have succeeded before you.

1.4. Aligning Your Private Practice Business Ideas With Your Values

Running a business that does not align with your values is a quick way to become frustrated. This is why people believe your business ideas should be such that they align with your values, passion, and vision. In fact, your business should be tailored such that it fits into your vision and values.

Your practice should not stop you from doing the things you love. It should not make you change your core values, the principles you live by, or the visions and goals you have for your personal life. Instead, it should strengthen them and help them become a better version of themselves.

Values define what you stand for. Alexander Hamilton once said, “If you don't stand for something, you will fall for anything.” Understanding your values helps you live an authentic, purposeful life that depicts the richness of what you want to be known for.

However, values are not your goals. You can easily scrape off your goals list once you achieve them. For instance, getting married is a goal you can scrape off when you do. Conversely, values can not be scraped off. Values are your core beliefs about what is essential. They are things you continuously live towards.

For instance, always deciding to make time for your family and loved ones despite your busy schedule is valuable. There is no timeline to that. It's something you wake up every day and live consciously towards. The day you stop doing that, you fall out of your values.

However, the first step will be to identify those values and then work towards building your business around them. This way, you not only get to do the business you want but also get to do it while living the life you want. Let’s look at some essential elements of living your dream life while still keeping your practice thriving.

Every individual has a set of values. Only you determine and define what these values are. You may have to explore for some time to identify your values. There are so many core values that people live by.

If you don't know what your core values are, follow these simple steps below:

- **Pick and Write Down your Values**

Pick at least ten values from the idea list below that resonate with your core beliefs and what you are passionate about. You can always do some research on more ideas you can select.

1. Happiness
2. Caring
3. Charity
4. Collaboration
5. Creativity
6. Curiosity
7. Dependability
8. Empathy
9. Health
10. Enthusiasm
11. Ethics
12. Excellence
13. Fairness
14. Family
15. Friendships
16. Flexibility
17. Freedom
18. Fun
19. Generosity
20. Growth

This list is not exhaustive, but it's an excellent start.

- **Consider the People You Admire The Most**

If you can't come up with the list yourself, consider at least six of the people you respect and admire. The list can include your heroes and professional mentors as well. And write out what you like about them or, better still, the values they embody.

- **Consider Your Experiences**

Also, you can consider your past experiences. Reflect on the happy and sad moments in your life, and reflect on what they reveal about your core values. For instance, reflecting on some sad encounters you've had with people may teach you compassion or empathy. At the same time, a happy moment may teach you motivation and leadership. It all depends on you and what you stand for.

- **Choose Your Top Core Values**

Having many values is good, but it's better to narrow them to between five and 10. If you have more than 10, sit and check out the most essential. Which ones resonate with your life the most? Write them down and see if they fit into the kind of practice you want to have.

If they don't, look for adjustments to make. If you need to adjust your schedule, time, practice goals, or anything so that your practice aligns with your values, kindly do. This is because running a practice that doesn't align with your values can make you miserable. You find yourself getting frustrated and livid at all times. Not only will this affect your practice, but your personal life will also take a hit. Sadly, you won't find any tangible reasons for that.

These steps above are not mental activities. They are practical. Take some time and consciously write them. Once you have this written down, design your work life around it.

Workbook

/Link for Dream Big Worksheets/

/Link for Workbook/

Module 2. Planning your Private Practice Business

The old saying goes thus, “If you fail to plan, you plan to fail.” This is fundamental to every successful business and every other thing in life. A business plan is like a roadmap; it guides the course of your business.

No one builds a house without a sturdy foundation. A sound business plan provides a sturdy foundation for your private practice. It outlines how you intend to grow and nurture your practice from start to finish. Although business planning is an ongoing process, as you must make

specific changes depending on the current circumstances, you must have a well-written document that will guide all your business endeavors.

Without a business plan, your business is like a rudderless ship that is vulnerable to the strongest blowing of the wind. A business plan in place makes you proactive and not reactive. You foresee possible roadblocks and prepare for them. It is essential for long-term success.

What is a Business Plan?

A business plan is a document created by a company that describes the company's goals, operations, industry standing, marketing objectives, and financial projections. It contains information for running your business.

To move from dreaming about having your practice to setting it up and running requires a lot of hard work. But a strategic approach can significantly beat down wasted efforts, time, and resources. If you put effort into researching and planning upfront, you are setting yourself and your practice up for success, starting with a rock-solid business plan.

Your business plan should cover your goals across all the major areas of your practice, such as human resources, sales, expenses, financing, etc. Basically, a sound business plan sets the following for your practice:

- A baseline against which you can measure and monitor your progress, keeping you accountable as you set up your practice.
- A roadmap to keep you focused and on track as the realities of running your own business begin to set in.
- A toolkit for continued learning as you stack your performance against your expectations.

2.1. Key Elements Of Your Private Practice Business Plan

Although your business plan will be structured to meet the needs of your practice, some key elements must be included in every business plan. To start with, your business plan must answer some basic questions, which form the basis for the critical elements in your business. The questions include:

- What problem are you trying to solve, and who is your target audience?
- What's your private pay rate, and will you partner with insurance companies?
- Where will your office be located? If you have appointments with people in person, then you will need a location.

The answer to these questions will provide clarity on the four elements of your business plan. They include;

- A detailed description of your business,
- A mission and vision statement of what you want the business to look like,
- Why your business has the potential to succeed.
- Your financial projections and means of raising funds.

These four key components are expressed in different sections of your business plan.

- Business Description
- Mission and Vision Statement
- Objectives and Strategies
- Financial Projections

2.2. Business Description

Your business description is pretty much an overview of your business. It gives a summary of your purpose and goals. This is also called an Executive Summary. It's a very important part of your business plan as it precisely highlights your:

- Target market demographics
- Services for clients
- Mode of therapy
- Special skills that enhance your practice (Are you bilingual? Trained to work with special needs children? Have a therapy dog on staff?)
- Plan to market the business

- Growth trajectory and timeline
- Competitive advantages over other practices in the area
- Funding requirements upfront and ongoing

Usually, this is the last thing to write in your business plan, but because it's very important, you should start with it, and then you can develop it better after you're done writing it. Your business description is a vital reference point as you flesh out your business plan. The more precise you are, the easier it is to write the rest of the plan.

2.3. Mission and Vision Statement

Another essential part of your business plan is the mission and vision statement. Businesses are built on a set of principles. Whether these principles are clearly defined or not, they exist. But when they are defined, they guide every aspect and endeavor of your practice, from the seemingly smallest things to stellar goals. It all relies on your practice guiding principle.

Private practice owners have many guiding principles condensed into mission statements. Your mission statement is a concise and precise description of what your practice is working towards. It explains your practice functions, purpose, and what it does for your clients. Simply put, your mission statement explains what you do and why. It's what inspires you and your employees to go in the direction you have paved for your practice.

A vision, conversely, is a picture of what you see in the nearest feature. Your vision statement should capture the future you want for your practice. Although your vision and mission statements reflect the goals and objectives of your practice, they don't represent the same thing.

Your mission statement should serve as a reference point to accomplish your vision statement. More like, your vision statement is "the destination," and your mission statement is "the road" that leads to that destination.

Your mission statement can evolve over time. In fact, as your practice grows and expands, you will most likely readjust your mission statement to meet the growth of your practice.

However, curating the perfect mission and vision statements is what most private practice owners find difficult.

Let's discuss how to create a mission statement for your private practice that has substance.

1. **Evaluate What Already Exists**

Every human has a set of personal values that they live by. Your mission statement should reflect your personal values as they apply to your private practice. This is because the only way to run a successful private practice, and even any business, is to ensure the principles guiding the practice are rooted in your values.

Here are a couple of questions to help you get started:

- ❖ Does your practice's current mission statement reveal your values?
- ❖ Does it clearly state them in a way that others can understand?

The two questions are fundamental if you already have a drafted mission statement. Go over the mission statement and be sure it embodies everything you and your business stand for. If you don't have anything ready, begin with the next step.

2. **Start With a Market-defining Story**

Who are your ideal clients? Why should people trust you with their personal problems? What does your practice provide for them? What makes your practice different from others?

All of these make up your market-defining story. Your market-defining story is unique to your practice and typifies what your business entails and doesn't.

However, this isn't part of the mission statement. Instead, having it in your head while you write the mission statement is essential. It's in the background, between the words. If you're having trouble getting started, make a quick list of what your company does and doesn't do.

3. **Define What Your Practice Does for its Clients**

Develop your market-defining story from the questions listed above, and curate a concrete story that makes up your mission statement. Start your mission statement with the good things you do.

Don't sell your practice cheap. You don't have to develop a cure for a particular mental illness before you appreciate what you do. Providing counseling and helping people in your community get out of a challenging period with your unique policies and principles is good enough.

Just ensure the good your practice does is meaningful, unique, and distinguishable enough to carve a space for yourself in your industry.

4. **Define What Your Practice Does for its Employees**

You don't necessarily have to have employees to do this. You're just starting out, and, in fact, you may want your practice to be virtual with just you. Regardless of what you have in mind for your private practice, in your mission statement, your practice culture, rewarding and motivating people matters.

Here are some qualities you should prioritize in your mission statement: fairness, diversity, respect for ideas and creativity, training, tools, empowerment, etc. Also, you can include your personal views about employees in the mission statement.

5. **Edit, Review, and Revise**

Preferably, your mission statement should be short and precise. So, you have to do a lot of editing and reviewing. The first thing is to cut out general words that everyone claims. Cut out as many general terms as possible, especially words that don't precisely typify your practice and personal values.

For instance, phrases such as “being the best possible,” “world-class,” and “great customer service” mean little because everybody uses them. You can take cues from the mission statements of other private practice owners. Take cues from them and write a personal statement for your practice. However, make sure you believe what you write. If you don't, others won't!

Once you're done with the mission statement, show it to others—preferably other professionals. Get reviews from them, and see if you can adjust it. As with everything in a business plan, your mission statement should never get written in stone, much less stashed in a drawer. Use it or lose it. Edit as necessary because change is constant.

2.4. Objectives and Goals

How do you want to raise money to start the business? Will you employ people to help with different aspects of the business? How much do you want to make in the first week, month, or year of starting the practice? These are some of the questions you must provide answers to.

With life and business moving so fast, there’s very little return in investing the time and energy into goals beyond three years when you’re just starting. This helps you improve your one-year goals and allows people to see your vision and determine if they want to participate.

Break your big plans into bits and specify a time frame. Make sure your objective is SMART; Specific, Measurable, Achievable, Realistic, and Timely. This is so important to the success of your private practice. It keeps you in check and monitors the progress of all your business projects. Let's talk more about the SMART rule:

- **Specific**

The most common mistake people make when setting goals is not being specific. Specificity allows for better planning and reflection on the achievement. Everyone understands private practice is all about helping people. So, you should be more precise about the kind of help you want to render and your target audience.

For instance, don't say, "I want to help people. Say, "I want to help young children overcome trauma." Also, you may have a goal of pursuing a particular course, such as trauma-focused therapy, for a certain period of time. Be Specific!

- **Measurable**

What do you intend to achieve with your goals? What's the expected outcome? For instance, "I'll attend to 20 clients' in a month" is a measurable goal.

With that, you already know that attending to less than 20 clients in a month means you didn't achieve your goals for that month.

- **Attainable**

Williams Shakespeare says, "To thine own self, be true." I understand you have to be optimistic, but as much as possible, be honest with yourself.

Don't set bogus or vague goals. Saying you want to attend to 70 clients monthly might be a little unattainable. Consider your schedule, resources, and availability, and set attainable goals. If you only have time for 20 clients' in a month, set your goals accordingly.

- **Relevant**

I said earlier that your goals must be such that they align with your mission and vision. You will get nowhere working towards goals that don't fit into the future you see for your practice.

If there are other things you're working on, do well to set individual goals for such projects. However, for your practice, set relevant goals.

- **Time-Based**

While building your private practice, there are different projects you will embark on, such as getting a location and furnishing it, setting up your online presence, and more. Put a date to these projects, and don't leave anything without a timeframe.

A goal without a time frame may not be accomplished because there is no time attached for it to be accomplished. More so, ensure you create ways to measure your progress. Once you have this written, it brings clarity and guides you through every step of starting your business.

Preferably, you should keep the goal dates within a year or your fiscal year, regardless of where you are in the year. So, if it's September, set your date as December 31.

After that, you can set up a brand-new complete one-year plan. A partial-year plan allows you to gain experience with the process between now and then. Also, you should review these goals quarterly/every 90days.

Tips

- A 90-day plan can take this format:

Decide on the most important priorities in the next quarter

Date:

Revenue:

Profit:

Measurables

Priorities for the quarter:

1. X
2. X
3. X
4. X
5. X
6. X
7. X

- For a year plan, your goals can take this format:

Choose three to seven most important priorities that must be completed in one year for you to achieve your three-year goals.

Date:

Revenue:

Profit:

Measurables

Goals for the year:

1. X
2. X
3. X
4. X
5. X
6. X
7. X

- For a three-year plan, the format can look like this:

Revenue: (settle on one specific number)

Profit: (settle on one specific number)

Measurables: (it might be the number of clients or units)

What will your business look like? (10-20 bullet points: quality of people, added resources, office environment and size, technology needs, products/services, etc.)

1. X
2. X
3. X
4. X
5. X
6. X
7. X
8. X
9. X
10. X

These goal-setting tips can go in any direction. This means you can start from a 90-day plan, then expand it into a year plan, and then a three-year plan. However, you should start from a three-year plan and then compress to a 90-day plan.

2.5. Financial Plan and Projections

Arguably the most important part of your business plan is your financial projection. This is so key to the success of your private practice. It may come to a halt anytime without enough funds to start and keep your practice running.

According to a survey, the leading reason most start-ups don't go past the first three years of business is lack of adequate financial planning and lack of money. You'd agree that the backbone of any business is funding. And if there's no sound financial plan to dictate the inflow and outflow of cash, businesses go bankrupt. Your private practice is no different: it needs financial backing.

Hence, a financial plan is an important section of your business plan. Whatever your line of business is, you need enough money to fund it. Create a cash flow detailing where your funding will come from, how you will cover expenses, and even when you intend to start making profits.

Since it’s a new practice, you should break your financial plans and projections down to the smallest bits, including a balance sheet describing your business's current assets, liabilities, and equity. You can always employ a professional to help you with it, as you will also need them for tax payments. We will discuss more on this later in the course.

Module 3: Branding Your Private Practice Business

We are still dealing with the fundamentals and setting the foundation solid. It’s time to choose and design your brand and its identity. Just like every person is unique in different ways, your brand identity makes your business unique and sets you apart from every business on the internet. Your brand is the impression people have about your practice. It is what draws them to you. It is why they choose to confide in you with their not-so-proud moments.

However, branding is not just a 'thing' or something you do just once. Branding is the ongoing process of establishing an image or impression of your practice in the minds of others. It is a sum of different factors and aspects of your practice. All of which you have to understand and know how they apply to your practice.

Let’s set the ball rolling with some definitions.

What is a Brand?

A brand is the way the world sees your business. The world’s perception of your business involves expectations, memories, stories, and relationships that influence your consumers to choose your products and services over others.

Creating a brand means you understand the client you want to attract. You will know the message they need to hear and use the right words to show them you are the right therapist for them. It also helps people identify if you’re NOT the right therapist. Choosing a therapist is a personal decision, and it’s our responsibility to help people make the right choice so we can support them on their journey.

What is Branding?

Branding is the marketing practice that creates a strong, positive, and quality perception of a business and its products in customers’ minds. In context, branding is a set of marketing practices that creates the impression and perception of your practice in your client's mind. Basically, branding is the act of making a brand.

We are in the digital age. An age where everything has been made easy, including starting any business. An age where there are loads of people with unique and strategic marketing practices already in the business line you're diving into. Now more than ever, your practice needs branding to thrive in the ever-competitive market.

Most people look for counseling and therapy online. When they come across any therapist, they first go through their website, social media platform, or directory listing, hoping to get convinced

of their services. When this happens, you only have a few minutes to convince them you're the right therapist for them.

Branding allows you to stand apart from other therapists and show potential clients what makes you special and unique.

What is Brand Identity?

Branding Pro, Marty Neumeier, defines brand identity as "the outward expression of a brand, including its trademark, name, communications, and visual appearance." Simply put, brand identity is the face of the brand—the face of your practice.

These three terms are somewhat related but perform different functions. Although a logo, business name, personality, customer service, price, and product quality, among others, are part of a brand, a brand is more of an experience or feeling that separates your business from others.

Put more simply; a brand is intangible. It's the feeling—the impression of your practice. Conversely, brand identity is tangible, including all the physical features of the brand, such as logos, typography, colors, packaging, and messaging. It complements and reinforces the existing reputation of a brand.

Let's start with some critical elements of your brand identity.

3.1. Naming Your Private Practice

Coming up with the perfect name for your practice can be such a huge task. It becomes even more difficult if you want to set up a domain with the same. If you want to explore that route, this name will impact your logo, domain, marketing, advertising, and trademark registration. Hence, your practice name should be descriptive of what your business does, and sometimes may be the name of the founder, too.

Regardless, your business name should be appealing, sweet, memorable, easy to spell when heard, have available usernames for social media platforms and a domain for the website, and be

concise. This process takes time and effort; therefore, be patient and open-minded. My advice is not to get married to one name too quickly!

Follow these simple steps to come up with a name for your practice:

- **Be Patient and Enjoy The Process**

Choosing a name for your practice is not a business license, liability insurance, or medical credentialing—it's the fun bit! It's the exciting part. It's like picking the finishes of your home. It's fun, although time-consuming.

No one will sanction you don't have a practice name after a year of practice. There's enough time to juggle different name suggestions and settle for one. Resist the temptation to categorize it as a banal to-do or to rush into a name you might later regret. Be open-minded. Patient. And have fun with friends and confidants while choosing a name for your practice.

- **Be Descriptive (but not too general or vague):**

The first thing to remember when choosing a business name is to ensure it is descriptive but not generic. Descriptive such that it conveys what your private practice is all about, but don't make it vague or boring. For example, do you have advanced training in working with the peripartum population? A name like "Mental Health for Moms" speaks directly to your target audience.

Avoid names that are hard to spell and those with unusual spelling. Remember to always choose "clear over clever". The more your practice name communicates to your target about your practice, the less effort you will have to put in to explain what you do.

- **Pick a Name Consistent with Your Brand:**

What do you want to be known for? How do you want people to see your brand differently from your competitors? Figure out answers to that and choose a name that aligns with it. In fact, you should include keywords that your clients will search for when looking for your practice online. Your practice name must align with what you stand for, and the services you want to provide.

- **Don’t Copy Your Competitors**

There are different things to learn and, maybe, copy from your competitors; however, their business name is not part of it. It’s okay to copy their business models but never try to imitate their names. Not only could this mean your business will be in their shadows, but it also might have some strict legal consequences. Do a trademark search to be sure the name is available.

- **Make Your Name Web-Friendly:**

You will probably need a website and social media accounts for your business. And preferably, your business name should also be your domain name. Hence, once you arrive at your business name, conduct domain research and be sure there is an available domain for the name. You can do a quick google search, or use Godaddy, where you can purchase your domain name. There are others like Bluehost and Hostgator. You can check for the availability of your preferred name, and buy a domain name.

Usually, simple and memorable do the trick for domain names. And for your social media platforms, ensure your business name is available before making a conclusion. Once you’ve selected a few possible choices, you should share them with a few trusted friends, family, and clients to get some feedback about the name.

- **Keep Growth In Mind**

Moreso, keep growth in mind and ensure that your name can evolve with the business, especially if you decide to expand into different markets. For instance, a name like " Bayside Mental Health for Moms" is limiting. You are not going to stay at the Bayside forever. Hence, ask yourself if your preferred name will be relevant today, tomorrow, and in 20 years. Of course, you can always change your practice name along the line, but that will require tons of paperwork. Just save yourself the stress and settle for a timely name and evergreen.

Finally, on selecting business names, if you are planning to have an identity offline, some words are prohibited in business names in some states, such as “Federal.” Also, some states require you to include words like Limited, Company, or Incorporated, depending on your business structure. Ensure you keep all these regulations in mind while choosing your business name.

3.2. Choosing Your Brand Color and its Importance

Next up on your brand identity is color. Generally, people have some form of psychological ties to different colors, and strategically using branding and colors can positively impact your practice. Color makes your brand stand different from other brands out there.

Colors have such a great effect on your brand's identity. And over time, it is what people remember when they hear your business's name. When you think of Starbucks, you think green; when you hear Coca-Cola, you think red, and when you think of Facebook, you think blue. These colors are seen throughout the brand's entirety. Starbucks has green in their store, employees' uniforms, website, and logo. The same thing with Facebook and loads of other top brands out there.

Furthermore, every brand wants to connect with its customers on a strong emotional level. This can't be done with just the brand's logo (we will discuss this shortly). Color sets the mood for brand expression. You should know what customers think about your business is not as important as how they feel about it. Considering that certain colors evoke certain emotions, it's safe to say that, if chosen correctly, your brand colors can drive sales and improve performance.

Another thing to consider is the repetition of the same color. Once you have chosen your brand color, ensure it's repeated throughout the user experience, including logo, website, and advertisement. It brings consistency and strengthens brands' recognition and awareness.

With all that said, below are three simple steps to pick your brand colors, and we will plan on using three colors.

1. **Base/Primary Color:** You need a base color that will reflect your brand's most dominant personality and appeal to your target audience. A practical way of doing this is to compose a list of adjectives that describe you, and your brand's identity, more like you are talking to a person. Once you have this list, narrow down on one adjective, and choose the most related color to it. Let's look at a couple of color examples and businesses.

    - For health and wellness, blue to signify cleanliness, trustworthiness, and responsibility is preferred. Green to promote nature and healthy living is another option. And orange to signify vitality and energy will also do well.

    - To signify glamor and sophistication, black will do well in the fashion and beauty line. Also, warm colors, such as orange and red, signify passion and confidence.

    - For tech businesses, blue, which signifies trust, intelligence, and efficiency, is a good option. Other options include purple, which stands for quality and creativity, and orange, which is friendly and optimistic.

Below is an image of colors and relevant personality. Be sure to check it out and choose which best suits you and your practice.



Alt Image text - Brand Color Psychology Chart - ilfusion.medium.com

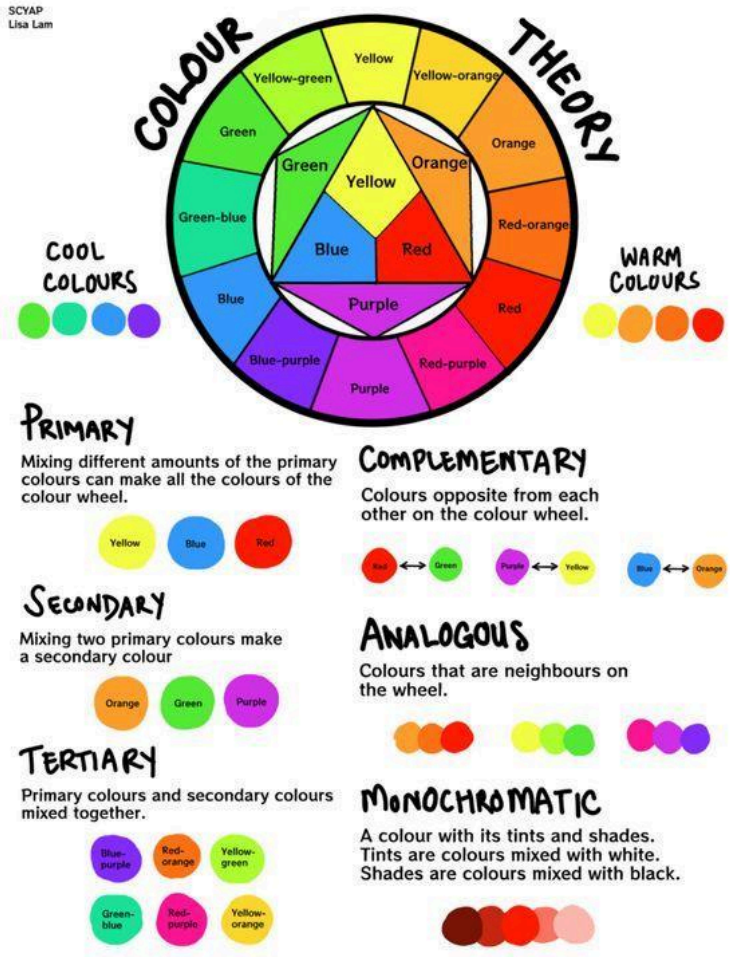
2. **Pick Your Secondary Colors:** Once you have selected the base color, pick one or two more colors to complement it. There are a couple of options to choose your secondary colors from. Let's consider a few.

    - **Analogous color scheme:** These are variants of your primary color. For example, if your primary color is red, you can pick other warm colors in the same family, such as orange or yellow.

    - **Monochromatic color scheme:** These are shades of your base color. If your primary color is deep blue, you can choose other shades of blue, such as light blue, to complement it.

- **Contrasting color schemes:** These colors don't necessarily have to belong to the same family or shades of the primary color. They just complement and make the primary color pop.

3. **Select Natural Colors:** Finally, choose a neutral color that will serve as the background of your designs. Usually, your neutral will be a hue of gray or beige, white or off-white. You can also choose black color, but black can be overpowering. Choose the one that resonates with your brand the most.



Alt image text - Basic Color Scheme - SCYAPINC.org

Brand color is particularly important for private practice owners because they are dealing with people's emotions, and mental health. There are some colors that carry years long meaning. Some colors are particular to a set of people. Hence, it is imperative that you carefully and

consciously choose the color that portrays your brand and the kind of services you offer. Colors that appeal to your target demographic.

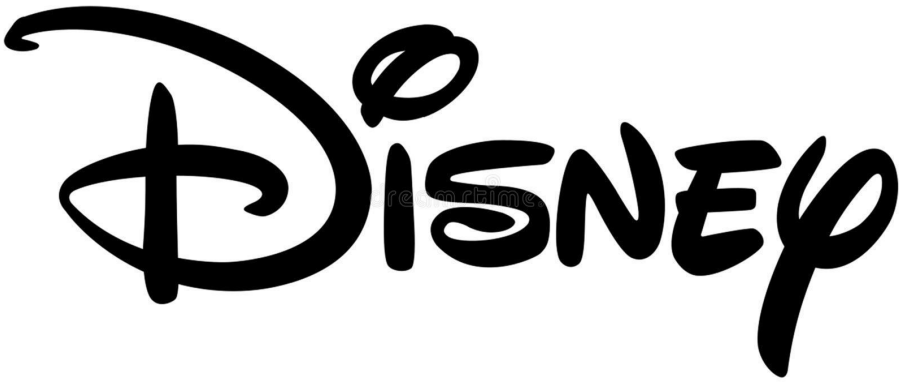
Take some time to do comprehensive research on professionals in your niche. Go through their website and see the type of color combination. If you can meet these professionals, ask them about the inspiration behind those color combinations. Listen to their story and take cues for your brands. However, ensure the colors communicate your personality and that of your brand!

Let’s talk about your brand logo.

3.3. Choosing Brand Logo

Your business logo is an important aspect of your brand identity. A good logo captures the essence of your brand, thereby making your business outstanding in the world. It is what people are mostly exposed to in your brand identity. It must be carefully designed and aligned with other elements of your brand identity.

Also, your logo must communicate your values and explore your brand's emotional appeal. For example, what comes to mind when you see this logo?



Maybe nostalgia, magic, laughter, or something similar. You relieve the creative and fun moments that Disney has created over the years. That’s exactly what a logo does to people. It brings the memories, essence, and values of your brand. When they see your logo, they don’t remember you. Rather, your clients will always remember how your services made them feel.

Hence, your logo must be carefully and consciously designed. Below are four simple steps to create a memorable logo:

1. **Establish Your Message:** Firstly, you need to know why you started the business. The story behind it. This is less about *what your business does* and more about *why you started the business*. The "Why" is your story and your message. Find out what that is and view it as a shape or color (we will discuss the importance of color later in this course).

2. **Determine Your Visual Identity:** It's time to establish your company's personality and strategy. This is where you need visual creativity as you will be exploring different fonts, colors, and icons.

   Tips for choosing the right fonts (with useful tips on text alignment):

- ❖ Don't use fancy fonts
- ❖ Don't mix more than two font families at a time.
- ❖ Do mix contrasting fonts (such as a serif and a sans-serif)
- ❖ Choose the right font size and line length for legibility.
- ❖ Align your text to the left. A ragged right is easy to read and will be achieved when you align text to the left.
- ❖ If your text is over 60 characters per line, it's okay to justify it. However, avoid hyphenation.
- ❖ Don't use all-caps to emphasize text.

Choosing the perfect icons can be challenging, too. Look at Google's Visual Assets Guidelines to see how they carefully explain their take on icon design. It's comprehensive and expansive.

3. **Check out the Competition:** You can also pick the brain of your competitors. You can learn from them. Research the market and see what works, but don't copy anybody's logo.

4. **Create Your Final Design:** Once you have your final draft designed, send it to a couple of people you trust to get a constructive and honest review. Get their feedback and make necessary corrections.

However, the most important rule of creating a logo is to keep it simple! For example, top brands like Google, Apple, and Coca-Cola have one thing in common; simplicity. They are simple and recognizable. A simple logo is like an open canvass that allows customers to fill up with the amazing experiences they have had with the brand. Also, the simpler the logo, the easier it is to scale between mediums such as digital advertising and the more traditional print advertising.

Finally, make your logo flexible enough to fit on huge billboards and tiny social media icons. You can always outsource the logo design to professionals and guide the freelancer with the tips discussed here.

Next up is to build a website for your business. Having a website for your business is just as important as every other factor we have discussed so far. Not only does a website make your business professional, but also it gives control when competing with other sellers on a large marketplace.

3.4. Building Your Website

Owning a website allows you to set your store policies, display your products the way you want, and even take payment that is convenient to you and your customers. Your website will be the central hub for all your marketing practices and social media platforms. The importance of having a website cannot be overemphasized. The fact remains that it is no longer feasible to run a business without a website.

Online presence has become integral to the success of any business in the world today. Although some believe there is no need for a website for private practice owners, the importance of having

a website is undeniable. A website not only gives you an edge over the competition but also makes your practice professional and reputable.

Your website is what informs people about your practice, the philosophy behind your business, where you're located, your niche, and everything that needs to be known about you. A single search on a search engine and your potential clients know everything about you. That's how you create a reputable presence on the internet.

However, your website must be user-friendly. It doesn't have to be complex, with too many pages or features. Ensure it contains details of what you do, the problem you solve, how they can contact you, and a page for Blogspot. You can upload regular mental health and mental impairments content on the blog page relevant to your practice.

Let’s look at six steps to building a good website:

1. **Choose Your Domain Name:**

Your domain name is the most important part of your website. It is the URL you will share on social media pages and send to your clients. So, ensure you are deliberate with the domain name.

Earlier, we talked about using your business name as your domain name. The most important factor is to ensure your domain name is short, precise, easy to remember, and descriptive. Possibly avoid abbreviations, numbers, and acronyms not to cause confusion.

After arriving at what to use, the next is to decide on your top-level domain, TLD. TLD is the suffix at the end of your domain name; common TLDs include .com, .net, or .biz. Some non-traditional TLDs are now used, some are based on location, such as .nyc, and some are based on the type of business, such as .marketing, .law, .agency, etc. The most preferred for online business is .com.

Once you have selected the name and the TLD, check for its availability, and purchase through the domain registrar. Below are common domain registrars:

- Domain.com
- Wix

- GoDaddy
- Squarespace

If the preferred domain name is taken, you can reach out to the company using it to buy from them, or you can come up with another URL. Never use an already existing domain name; you could get slapped with a lawsuit.

2. **Choose a Web Host:**

A host is a server where all your data is stored for public access. This is important for every website. Hosting your website is very expensive; hence, it is more preferred to select an external host.

There are two different routes to choose from, depending on your budget. If you are working on a tight budget, you should consider a shared web host, which means you will share a server with other sites. If you have a bit more flexible budget, dedicated hosting will be a nice option if you have a more flexible budget. It costs more, but you will get your private server without worrying about other sites dragging your speed.

Some popular website hosting companies include:

- GoDaddy
- DreamHost
- Bluehost
- InMotion
- SiteGround

3. **Build Your Pages:**

A website is more than just a page or a home page. You must have multiple pages dedicated to different sections of your business. You need a catalog page to display your products and services, a blog page for business updates, a FAQ page to provide timely answers to your site

visitors, etc. However, ensure uniformity across all these pages. All your site pages must be talking about the primary goal of your business, and they include “Call to Action” (e.g., “learn more,” “sign up,” “contact us,” or “buy this”).

Here are six recommended essential pages:

- **Landing Page:**

  A landing page, also known as the Home Page, is where your potential customer will land when they search for you and your business. It’s typically the first page most people will create when building a website. You want to keep your landing page clean and to the point.

  Preferably, include an image of yourself (if you’re the face of the company), and a place for your visitors to put their email addresses and name. This page should have a clear call-to-action— a link, button, or sign-up form that tells visitors interested in your services what to do next.

- **About Page:**

  An about page is where your potential customers will learn more about who you are, why you do what you do, and if you’re the right person to guide them to the transformation they are looking for.

  Your "About Us" page lets you inject a little personality onto your site and let your visitors know how you started, your mission, and why they should trust should trust your practice.

- **Contact Page:**

  The “Contact Us” page is very important. This is where you include the contact details, such as your business’s phone number, email address, and physical location if you have one.

  You make it easy for your customers to get in touch with you. The important thing about having a contact listed on your website is that users won’t need to open another browser

window to write their message and will probably stay on the website after sending the message.

You can simply have your email and other contact information on this page, or if you go the DIY route, you can integrate a form. If you choose an all-in-one platform, a form should be already included.

Even if you include your contact details at the bottom of every page on your site, you still need a stand alone contact page. People will look for this, typically at the top far right of your menu or in the footer, so it's best to have it available in both places.

- **Blog Page:**

Even if you have a podcast or use videos as your content platform, you will want a place to house all your website content for SEO. Update mental health content, and related stuff. You can use that on your blog page to boost SEO (search engine optimization.)

You'll need to create a new page for each blog post; however, you should have one main blog page to the house (and link to) each of those pages. Ensure the content are well optimized and top-tiers

- **Services Page:**

Another important group of "must have" pages describe your services (or products). This page clarifies what services you provide and is as specific as possible. The categories of therapy you offer can come on this page.

While some businesses list them all on one page, having separate pages helps you have a better chance of showing up in the search rankings so you can keyword optimize for the particular service.

It's perfectly fine to have a one-page list of all your services; just note that potential clients will get a better feel for your offer if you use more than one paragraph on a combined service list page.

- **Privacy Policy:**

A privacy policy is a document that sets out how your business handles personal information. If you collect personal information from users, you need a privacy policy on your website. Many laws require you to include a privacy policy that explains your data-handling practices on your site.

This also shows customers you are being ethical, responsible, and transparent about their data (and will also help you to avoid being fined.) When writing your privacy policy, research the specific requirements for your business depending on the audience, region, and third-party services used.

It is highly recommended to hire an attorney to look over it if you want to take extra precautions. More on this will be discussed later in the course.

To boost the quality of these webpages, below are three tips:

- **Be Clear About What Your Business Does**. Reading long posts, except where necessary, can easily turn off your site's visitors. Make your landing page very concise and clear so visitors can figure out all they need to know about your business in a few seconds.

- **Place Strategic Calls to Action**. The information on a page should determine the type of CTA on the page. A “buy now” button will make sense on a product page, just like the “contact us to learn more” button will be more appropriate on the “about us” page. Also, you may include a link on the review page that will take visitors back to your products or services page.

- **Avoid Stock Photos.** Try not to use stock photos on your websites as much as you may be tempted to. It’s an easy way to turn visitors off. Get a professional photographer to take real pictures of your products. Invest in high-quality pictures of products and services you sell. It's a worthy investment.

4. **Set Up Your Payment System:**

If you sell values (product or services) in exchange for money, you should set up a payment option. The simplest way to do this is through eCommerce software or small business credit card processing solutions. More on this later.

5. **Test and Publish Your Website:**

Before publishing your website, check for its usability on different browsers, such as Internet Explorer, Microsoft Edge, Firefox, Safari, and Chrome. Also, check and ensure every page is responsive both on the web and mobile versions. Ensure the images show up the way you want them, the links are correct, and the format is smooth. This must be done carefully and not in a hurry.

Also, ensure the website is responsive on phones. This is very important as some search engines, including Google, now prioritize the mobile performance of websites for rankings. Setting up an analytics program is another important thing before publishing your websites. This helps you coordinate research, monitor the performance of each page, see how your clients interact with your site, and finally make informed decisions.

Your website must be appealing and attractive to visitors. The aesthetics must be top-tier and the interface easy to navigate. The font choice must complement the colors of the website.

Once all that is done, publish your website and market across all your social media pages.

6. **Invest in Search Engine Optimization (SEO).**

SEO is an important part of your business's long-term success. When you submit your website to search engines, it makes your site visible and directs potential clients to your page. However, it starts with deploying a strong SEO strategy across your website.

Let’s see a couple of SEO benefits.

- Defining title tags, meta descriptions, and Uniform Resource Identifiers (URIs) relevant to your company and aspects of your industry can boost your rankings in search engines for the products or services you're trying to market.

- Inputting relevant keywords on your website will drive traffic to your website. And continuous on-site SEO strategy will keep your web pages relevant and help you move up the ranks.

Now, let's consider a few SEO tips to increase your website ranking on search engines:

- **Choose the Right Keywords.** Conduct keyword research, select relevant keywords to your business, and use them richly across your website.

- **Publish Updated Content.** Outdated content de-ranks your website on search engines. It waters down the relevancy of your website. That's not good for your business. Hence, ensure you regularly update your website with blogs and high-quality images. Choose any topic related to your product and write SEO-optimized content for your website.

- **Maximize Your Site Speed.** Your site pages should load very quickly. It is also key to your website doing well on search engines. You can contact your developers for this.

Remember, you can always hire a professional web developer to build a website for your business. All you need to do is provide the person with all the important details. And if you want to build the website yourself, these steps and tips will also guide you. This step will be discussed more later in this course.

Module 4. Registrations and Licensing

To so many people, the legal aspect of starting any business can be such a drag. They see it as a challenging and boring process. Well, the truth is registering your business can really be very challenging and tiring, but it is non-negotiable. This is because your private practice job involves dealing with humans, and the seemingly slightest mistake can be very costly.

You're personally liable for any damages incurred, including humans, finances, or any other aspect of your business. This means you can be sued, and your personal properties, including bank accounts, investments, home, and other assets, could be seized or even lost in the process.

However, registering your business or private practice protects not only you but also your personal assets..

Moreso, depending on where you are located, registration requirements differ from state to state. Which also include registration fees, and all. And because every business and business owner is unique, it may be worthwhile to consult with a legal or tax professional for advice on choosing the best business structure for your long-term goals.

However, it is important to know and understand what is required of you, and your practice. This will help you give precise details of what you want, and inform the decisions you make. You can, also, do it yourself. Although it can be a little stressful, it's achievable.

Interestingly, that’s why we are here! We will walk you through a step-by-step guide to registering your practice without hassle.

4.1. Choosing Your Business Structure

The first and the most important thing to do when it comes to registering your private practice, or any other businesses, is choosing a business structure. Floating your practice without a structure makes it vulnerable to different legal claims, and, in fact, it affects your practice's growth and productivity. Structure provides guidance, clarity, direction, healthy expectations, responsibility, and healthy relationship between you, your clients and your employees. More so, it enables better decision-making.

Now that you know what structure does to your practice, let's talk more about it and the different types there are.

What Is a Business Structure?

Basically, a business structure describes the legal structure of a company, your practice, that informs daily operations. As we have already established, it is important to be crystal clear on ownership, limiting personal liability, managing business taxes, and preparing for future growth.

Also, a business structure, or a business entity, if you will, makes it possible to have an official bank account, and business number, enter into contract, and do business without making yourself and assets vulnerable. A business structure makes your practice professional, and good enough for people to invest in.

This is not to say working under your name is bad or illegal. No, it isn't. However, if you want to start earning a full-time income from the business, sign contracts, or hire employees, it's likely in your best interest to choose a business structure and register with your state.

Note

- A business structure is a form of legal organization for a business.
- The right business structure may offer personal liability protection and other benefits.
- Most businesses should choose a business structure and register with their state.
- There are unique pros and cons of each type of business structure for every business.

Types of Business Structures For Private Practice

There are different business structures for private practice. In this course, we will consider four of these types:

- Sole proprietorship
- Partnership
- Corporation and
- Limited liability company.

We will discuss these four types, including their peculiarities and drawbacks, and tax implications. However, before we go into that, you must first understand what you want for your practice, as this will help you choose the most suitable business structure for your practice.

There are several factors and things to consider to help you decide the best type of legal structure to adopt. They include;

- The type(s) of services you offer

- The mode of your practice; whether online or physical, or hybrid (More on this later in the course)
- The size of your practice, including whether plan to hire employee or jointly own the practice with other private practice owners (and perhaps from other licensed health disciplines)
- The amount of control you want to have over the administrative operations
- How much organizational structure you would like
- Tax implications for various practice models
- Future plans of your practice (i.e. do you plan to keep it small or seek to grow the size of your practice?)
- Your desire to limit or separate your personal liability from the practice's liabilities
- The likelihood of being involved in a lawsuit reflecting the types of services you provide or plan to provide (for example, forensic work)
- The practice's expected profits or losses
- Your need to access capital

Bear in mind, however, that some of the discussed requirements and peculiarities of each of the business structure may be slightly different depending on the state where you are practicing. Hence, you may want to make further clarfications at your local government office, or better still, hire the services of a professionals.

1. **Sole Proprietorship**

In simple terms, a sole proprietorship is a business owned and controlled by a single person. This is the cheapest, easiest, and arguably the most common type of business structure for private practice. You have complete autonomy of your practice; you make decisions, dictate the rules, regulations and mode of operations for your practice.

Also, it's the simplest type of business structure to start. You don't need much paperwork, taxes requirements are minimal, the registration fee is relatively cheap, and even opening of bank accounts is easy. This is the best form of structure for your practice if you don't want rigorous paperwork, or you just want to start small. You can switch to a more suitable business structure later if you want to.

Although, like all businesses, you may need to obtain the necessary licenses and permits. However, there are downsides to this type of business structure, and you will do well to pay attention to them if that's your preferred type of business structure.

- No liability protection.
- It's harder to get financing and business credit.
- It's harder to sell your business.

Let's explore these points more:

- **No Liability Protection.**

Earlier, we said one of the benefits of a sole proprietorship is that they don't need to register as a business with their state of operations. Sadly, this could also mean they are open to the benefits of running a legal business entity. Simply, sole proprietors are considered self-employed, and that means you're on your own with regard to your business transactions.

Your practice doesn't have any legal protection. You are personally liable for all of the practice's debts, losses, and liabilities. If you have employees,you are legally liable for their actions, also.

For better understanding, consider LLC, a type of business structure. It offers some form of coverage that protects your personal assets from being seized, and also protects you from being sued personally for issues relating to your practice.

For sole proprietors, conversely, these coverages aren't in play. There is no distinction between your practice and yourself, and this may open you up to additional risk if there are problems with your business.

- **Very Difficult to Get Financing and Business Credit**

Another drawback of this type of business structure is that it can be pretty challenging to get funding or loans for your practice. Every bank wants to work with an established business. A business with legal backing, and substantial credit history. Running a sole proprietorship means you lack these requirements making it a lot more difficult to get loans and financing than other type of business structure.

Also, it's more difficult for private owners running sole proprietorship to build business credit. This is because they don't have a separate business accounts and credit cards. And in fact, the practice as a whole relies on the initial investments, finances and credit history of the owner; hence, all the liability and funding comes from a single person, the business owner.

This doesn't mean all hope is lost if you want to run a sole proprietorship type of practice, as you can always seek personal loans. However, your personal assets and properties can be seized if you can't repay the loan.

Moreso, under sole proprietorship, the practice ceases to exist once the owner dies. You can not sell or hand down your business to someone else. And if you must do, you will sell your practice asset, not as a whole.

2. **Partnership**

Another structure you can consider is owning your partnership. Here, you get to own your practice with other colleagues. Basically, under this type of business structure, the partners contribute resources, expertise, money, and labor to ensure the practice grows and expands.

There are three types of partnership, and they all differ in the level of control of the business and personal liability. Hence, ensure you consult with an attorney to draft a partnership agreement in order to address how ownership and business authority will be shared, how decisions will be made, how disputes will be handled, and how to deal with a buyout if a partner wants to leave the partnership. This is very important to avoid any disagreement along the line.

Also, you will need to obtain business licenses and permits, and register your practice in your state, through the Secretary of State. These requirements will depend on the type of partnership you run.

Briefly, let's look at these types and the major highlights under each.

General Partnership (GP):

- Partners own and manage the practice together
- All partners are involved in decision making
- Relatively simple taxes
- Profits are shared among partners equally
- Each partner has unlimited liability under the partnership for its debts, losses and liabilities, including the unlawful and inappropriate actions of partners and employee (s) in the partnership.
- Although the partnership must file a tax return, it does not pay taxes on the income.

Limited Partnership (LP):

- Partners in Limited Partnership are not involved in the daily running of the business.

- Partners serve as investors.
- Limited partners have limited liabilities in the partnership. Precisely, their liability is limited to the confines of their original investment.

Limited Liability Partnership (LLP):

- partners are not liable for acts, omissions, or negligence by another partner.
- They are, however, liable for their own inappropriateness, and negligence, as well as that of any employee they supervise
- All partners can actively manage the business
- Requirements are strict and they vary from state to state.

3. Corporation

Unlike the common notion that corporations are multi-million-dollar companies with loads of employees. No doubt, setting up a corporation is challenging and quite expensive, but it is just a company that stems from a sole proprietorship to a legally recognized business entity.

A corporation is considered a separate legal entity from the owners. This means debts and damages of the practice are limited to the corporation assets. Usually, a corporation is owned by more than one person, and a shareholder is liable only to the extent of his or her investment.

If you're considering this type of business structure for your practice, you should see and sit with an attorney for better understanding of all that is required and embedded in setting up a corporation.

Below are some key things to note about corporations:

- Your practice would pay its own taxes on income and file its own tax on returns
- Shareholders also would pay income tax on shared profits. This means your corporate income is subject to double taxation.
- Health care practices are considered Professional corporations, PC, because a license is required to provide the services.

The laws governing the ownership and management of PCs are state-based. This means you should consult your state office to know what is required of you and your practice. Corporations are of two types; the ‘S’ corporation and the ‘C’ corporation, and you can register as any depending on what works best for you and your business.

The ‘S’ corporation comes with the option of “Pass-through taxation,” which means your online store will not be taxed on a business level. S corporations were designed for small businesses and ideal for new online business owners.

Conversely, the ‘C’ corporations are considered separate entities for taxation. You get taxed on the profit your business makes and your personal income. It’s good if your business is starting big with many investors and employees.

An LLC can be set up as an S-Corp for federal tax purposes so as to enjoy the single taxation that the Code provides. There are limits to the type of entities and persons that can form an S-Corp, and these can be found on the IRS website.

4. **Limited Liability Company (LLC)**

LLC is the more flexible and common business structure. This is because of the liability and tax advantage combination. For its members, this form of business structure offers limited personal liability, which means your personal properties are different from your practice and hence, protected from any damages or debts incurred by your practice.

Also, LLCs are taxed either as sole proprietorships, partnerships, or corporations, as the government does not recognize them. This means income would be reported on the members' personal tax income tax returns. Simply put, LLC does not pay tax on the entity level, but all profits flow to the LLC’s members.

The number of members required to set up an LLC varies from state to state. While some states require more than one person to set up an LLC, some allow single-member LLCs. Members of an LLC can include individuals, corporations, and/or partnerships. Members of the LLC can be involved in the decision-making regardless of the size of their financial investment in the company.

LLC can have an employer identification number, assets, and liabilities different from the members or owners of the business. Also, members of an LLC can either choose to be involved in the day-to-day running of the business or employ a manager to oversee the affairs of the business.

In summary, LLC is a hybrid of sole proprietorship and corporation. You get to enjoy the benefits of both business structures. Interestingly, the liability risk of a sole proprietorship is reduced, and

the tax burdens of a corporation are reduced. Now you see why LLC is the most common business structure, and it might just be the most suitable for your practice.

Although there are other business structures, these are the most common options for online businesses. As your practice flourishes, you can always switch from one business entity to the other; there is no rule against that. Remember, whatever you decide on the structure you want for your practice, there will be legal and financial implications. As such, consult your lawyer, and a financial advisor before deciding on anything.

4.2. Registering Your Practice

For online private practice owners, this is like filling out a couple of forms and paying some fees. However, if you fill LLCs or partnerships, the application might take a little longer.

Also, the application steps might vary depending on your location and state, but the following steps will set you on the right course to registering your practice.

Register the Business Name:

Remember you have decided on the business name and ensured that it is not taken yet. If you haven't, that's the first step to registering your business name. Make sure your business name isn't already registered with the United States Patent and Trademark Office (USPTO).

Future-Proof Your Business Name:

It can be challenging to change your business name after registering legally, and it can confuse your existing customers. As such, ensure your business name is future-proof. Give enough thought and deliberations to it before registering it.

Obtain State and City License

Get your business registered and obtain your license. You need to let your city and state know you're in business. Visit your local government office and register through the secretary. Be sure to check for any specific registration requirements on your state's official website.

Choose the State You'll Register In:

To be clear, if you are considering an online practice, you are not mandated to register in the state of your practice. But if you're looking at physical practice, where you rent space and all, then it must be done in the state you have your office. With that in mind, take some time to research business registrations in different states and choose the most convenient for you and your business (if it's online.)

The tax rates vary from state to state. Also, some states have low and even non-existent sales tax rates, such as Delaware, Oregon, Alaska, Montana, and New Hampshire. Registering your online business in any of those states is ideal and cost-effective.

To register in other states, you can visit their local offices and learn about the registration procedures.

Obtain Your Business' Federal Tax Number:

Apart from state registrations, you will also need to register your business on a federal level. You will need a federal tax number called the Employee Identification Number, EIN. This is like the social security number for your business.

Getting your EIN is very simple, and you will most likely get it on the day you apply for it. Just submit your form and apply online. You must get your EIN before submitting your tax forms for state or federal registrations. Without the number, you won't be able to apply for any tax registration.

Obtain Your National Provider Identifier Number:

You need an NPI number to get insurance for your practice and business. NPI is not particularly a foreign concept; in fact, if you have worked in an agency before, you will probably know about the number.

This number is a unique, government-issued, standard identification number for individual healthcare providers as well as provider organizations like clinics, hospitals, pharmacies, schools, and group practices.

Preferably, you should get two NPI numbers, one for yourself, the practice owner, and the second number for their business. An NPI number is free and easy to get via the NPPES website. The website can find all the details and requirements for obtaining the NPI.

HIPAA provisions require all healthcare providers who are HIPAA-covered entities to have a National Provider Identifier (NPI). More details on HIPAA will be covered later in the course.

If you would like to know more information about NPIs before you make a decision click the button below:

/NPI: What You Need To Know/ Link here

Opening a Business Bank Account:

Finally, you should consider opening a bank account for your practice. Not only is this required for tax purposes but also, it is necessary for credibility and professionalism.

Opening a bank account helps you separate your personal finances from your business. It gives you a clear picture of expenses and expenditures. Clients trust you more when they make payments into your business account, not your personal account. Before you open a business account in the bank, you will be required to submit documents of your business registrations.

Ensure you have all the necessary documents prepared before going to the bank.

NOTE:

The information presented in this module is for informational purposes only and does not constitute legal or financial advice.

Module 5. Setting Up Your Business

Any business's legal and ethical compliance aspects can be such a drag. However, it is an essential part of your business. One key aspect of this is curating a policy and procedure manual. This manual will serve as a guide for what your practice entails. It will cover your therapy, procedures, rates, and legal work of your practice.

You may need to sit with an attorney and a senior colleague, maybe your mentor to do this. The information contain in the manual will vary depending on the scope of your practice, niche, country and state where you are practicing, rates, and some other factors. Hence, we may not be able fully cover all the information that should be in your policy and procedure manual.

Also, you will have to come up with a name for the manual. Preferably, it could be the name of your practice, as that will help create some form of uniqueness for the manual. Remember, it's perfectly fine to read through other private practice owners' manual to get inspiration to write yours.

5.1. Develop Your Client Policy/Procedure

When you are starting out, you will need to give your clients a bunch of forms to fill out. These forms are meant to tell your clients about the treatments, what you will be doing, seeking consent amongst many other things. These forms are given out so your clients know what they are signing up for.

Here are some forms clients will need to fill out when they come in for treatment.

Informed consent

With this paperwork, you tell your clients what you will be doing to them. Your privacy policies and practices during the course of the treatment are explained here.

Assignments of Insurance Benefits for Therapy

To insure smooth billing for services rendered, you must authorize this Insurance Billing Authorization Form. (for Multi-State).

Biopsychosocial Intake and Client Information Forms: Child and Adult Versions

The Biopsychosocial Intake Forms cover the necessary biological, psychological, and social aspects of your client that you'll need to assess at their first session. It also collects all the demographic details you'll need for your client's record. These forms are thorough, child-friendly and adult-friendly, and they're easy to fill out.

Couples Biopsychosocial Intake and Client Information

This intake form is meant for couples, enabling each partner to complete their own form separately. The therapeutic value of this form lies in the fact that it allows for two different perspectives on a relationship, which may be useful in identifying problems.

Insurance and Self-Pay Private Practice Consent, Policies, and Agreement

Limits to Confidentiality – Confidentiality is limited by various factors, including electronic communication, social media and a couple's policy of telling each other everything.

Therapy process - Therapy is a risky, benefit-laden, expectation-laden process that involves structure, lots of length and a cancellation policy. Fee structures are also part of the therapeutic process.

Reasons for Not Accepting Insurance - Risks, Confidentiality Myths, and the Effects of Having a Mental Health Problem Diagnosis

Consent & Emergency Contact

It is important to always keep this document up to date. This way, your clients will feel confident that they can reach you when they need assistance. Not only does this form contain the signed of the client, it also includes sections for name and number of emergency contacts. However, please remember that a client may have more than one emergency contact. If your client is not able to provide information on the people they would want contacted during an emergency, please add those details on the form yourself.

Consent to Treat Minor and Adult Clients

Many therapists are currently required to have a Consent to Treat form for their adult clients. If you work with minors, most states also require a Consent to Treat Minor and Adult Clients form, or some variation of it. It should be kept on file, signed by the client at their first and every subsequent session.

A Summary Of Discharge And Therapy Termination

To ensure that all relevant documentation is provided to other treating providers, this form must be completed prior to terminating services. It covers: when, why and how treatment ended;

diagnoses, treatment participation and progress; observations, risk factors and clinical recommendations; aftercare plan and support systems.

Counseling Documentation/Communication Form

Included in this form is a way to keep track of all the interactions you have with clients, including when you call them, when they change their appointment time, when you collaborate with another treatment provider (when appropriate), and when you talk to their family members or significant others (when appropriate).

HIPAA Form for Therapists

This document contains important information about federal law, HIPAA, which protects patient privacy by requiring healthcare providers to set policies and procedures to safeguard PHI.

Good Faith Estimate

In 2022, the federal government implemented the “No Surprises Act.” The law impacts private pay therapists and clients who don’t use their insurance for therapy services. Therapists are now required to provide a Good Faith Estimate (GFE) to clients before they begin treatment.

Mental Examination and Diagnosis Form

A mental status exam is like a physical exam, except it's on the brain instead of the body. The exam includes a questionnaire filled out by the patient and objective observations by the therapist. It also includes space for diagnosis and clinical summary/narrative.

Therapy Progress Note Template

This process/progress note template is formatted to document the notes you take during client sessions.

Therapists Release Information

As therapists, we must have a written document signed by each client granting us permission to talk with other people about them. This document gives us two choices: We can either ask the client to sign a bilateral release, or else we can ask them to sign a unilateral release.

Therapy Treatment Plan template

The client’s treatment plan is one of the most critical aspects of any case. It contains all of the information needed to understand and treat a patient, including a list of their problems, symptoms and diagnoses; and details on what you are going to do about it.

Welcome Letter to Therapy Clients

This template is one you can revise that welcomes clients to your practice and helps them feel like they already know you. It is a welcome mat that can be customized with your logo, contact information, and other pertinent details. It's easy to get started!

This can be further developed to include your state and local government's policies.

5.2. Know Your Mode of Practice (In-person, Online Services or Hybrid.)

Up next is to choose your mode of practice. With the advent of sophisticated technology and the COVID-19 pandemic, virtual therapy has become a thing. Not just about private practice only, as many businesses in different industries have gone virtual. The ease, flexibility, and affordability that come with it make it easy for people to dive in and start an online business easily. So, it's really not something new to have virtual therapy.

In fact, it's become so common that many clients prefer conversing with providers virtually. The convenience, privacy, and comfort it brings are too good to ignore.

Even some prefer phone-based therapy. This form of practice is pocket-friendly and convenient. You don't have to worry about space; you do everything from the comfort of your home.

Although virtual therapy seems all perfect, many prefer physical therapy practice. They want their space, meet with their clients in person, and form human connections with them. So, what's your decision— are you looking for an office where you meet your clients in person? Or do you just want to sit in the confines of your home and converse with your clients? Interestingly, you can do both. There is no crime in that. In fact, that's what most private therapy owners do. Whatever your option, we will walk through a step-by-step guide to setting it up.

For better understanding, we will start with some steps peculiar to setting up each mode of practice and then discuss the general stuff that is required to get your practice started.

Let's get started!

Setting Up a Virtual Therapy

To get your virtual practice rolling, below are major things you should prepare:

- **Set Up Your Workspace**

Although you will not be working from an office, you will still need a workspace in your home. You will be running sessions on video calls mostly, hence, the background must be professional and elegant. This means you have to carefully choose your workspace features like the furniture and paint color.

Aesthetics matter. And since you will be dealing with people's emotions and mental health, it's only ideal if you create a comfortable and relaxing environment for your clients. Hence, you may want to consider plants and calming artwork for your background and non-fluorescent lighting.

Also, white paint or any plain color from your brand colors will function quite alright. Remember, we talked about colors and their importance earlier in this course; you should refer to them back in Module 3.2.

Equipment

Before you start offering your therapy services remotely, you will need some key devices and gadgets to set up. Although you may already have these devices, this guide will provide more details on some of the best equipment you can choose for your practice.

Computer

You don't need the most sophisticated desktop to get started. There are some decent laptops that will do the job without hassle. When choosing a computer for your online therapy practice look for:

- A monitor at least 24” for a desktop
- Minimum of 4GB of RAM
- Quad-core processor
- 240GB SSD or more
- Integrated or Discrete graphics processor capable of 1366 X 768 (HD) resolution, or better (1920 X 1200)

Most of your sessions will be video based. These specifications are pretty important so that your computer doesn't start hanging or lagging while you're in a session with one of your clients. More so, you will be running some software on this computer, so ensure the computer is strong enough to power this software.

Good Wi-Fi

The strength of WiFi connection is so important to the success of your virtual practice. It's your single point of strength and weakness. No client wants to consult with a therapist with a bad network. A network that freezes all the time and leaves you choppy video quality.

Apart from that, all the tasks involved in your practice, including bookkeeping, scheduling, invoicing, video sessions, etc, relies on the strength of your network to function. For seamless and smooth video conferencing, you should have between 1-4Mbps, or else you'll risk lag.

Lagging network will negatively impact your customer's satisfaction and your rating will drop. And more importantly, a lagging network can breed frustrations for both your clients and yourself. Hence, ensure your WiFi connection is strong and reliable.

Webcam

This is a piece of gadget you want to ensure you have the very best of. In fact, it's one of the most important pieces of equipment for starting to see patients online. Many computers come with an in-built webcam, but if the computer is not of high-grades, their webcam is subpar at best. It produces blurry, and dull videos that look so unprofessional.

You clients need to see you clearly. It's so important for them. With this in mind, it's worth investing in a good webcam. Some key features to look for include:

- On-camera video processing
- At least 30fps video recording
- High-definition video at 1080p (you don't need more)
- Auto-focus with face tracking
- Here are some great webcam options for your online therapy practices.

Microphone

Also, your clients need to hear you loud and clear. No noise, or any other disturbance. Many laptops also have in-built microphone but the quality is below average. Not good for professional practice.

Depending on your budget, you can always go for affordable microphones that will produce quality sound. And if you have a large budget, you can go for XLR or other top-tier products.

Preferably, you should look for one with a cardioid polar pattern, which means that it only picks up the sound directly in front. That way, it reduces ambient noise and only picks up your voice.

Ergonomic chair

You need a comfortable and convenient chair since you are spending long hours attending to your clients. Your choice of chair should be ergonomically friendly, too. The chair should be adjustable, and have proper lumbar support. Sitting on the wrong chair can damage your posture over a long time, and even lead to severe back pains. Ensure you pick the ones that provide maximum comfort.

Software

You will also be needing software to effectively run your virtual private practice. So, once your workspace is set up, below is a run down of some software you will be needing.

- **Antivirus**

Your entire practice will be run on a computer. Your clients files important information and data, confidential files and the likes will be on your system. Hence, becoming a victim of cyber attack is the last thing you want and can be really devastating.

You don't want your patients' information falling into the wrong hands, or even have to halt your practice due to cyber attacks. Quality antivirus software will be your first line of defense against hackers and protect your computer and all the data contained on it.

Below are a couple of things to look out for when choosing an antivirus software.

- Web browsing protection
- Malware protection (viruses, spyware, phishing, ransomware, etc.)
- Firewall
- Virus cleanup mode
- Computer backup options
- Minimal memory usage
- Payment processing software

Moreso, your practice won't be restricted to just your state alone as you will also accept patients from different parts of the country and the world at large. This means you will be accepting payments in multiple currencies, as such, you want to look for a secure way of processing payments.

Whatever payment processing software you decide on, ensure it has a strong and reliable gateway to prevent credit card fraud, prevent suspicious transactions, provides practice management, messaging, client portal and it's PCI compliant.
Let's consider a couple of benefits of online private therapy.

Benefits of Online Private Practice

1. **Easy Startup**

Unlike starting an in-person private practice where you need massive overhead costs to cover rent, light bills, property taxes, etc, online therapy comes with nothing of such. No brick and mortar locations, no worries about furnishing, or renovations. Although you absolutely need to possess some certifications and credentials, with your laptop and a good network connection you can start small from the confines of your home.

2. **Seamless Work-life Balance**

Also, virtual therapy affords you a greater work-life balance. You don't have to ditch what you love doing because you run a private therapy. In the middle of your sessions, you can slot in some of your hobbies. Virtual therapy also allows you to create enough time for family and your loved ones.

3. **Convenience and Comfort**

This is not just for the therapist alone, but also for the client. Virtual therapy makes your clients at ease and comfortable to speak with you. They don't have to worry about the number of faces they will come across before getting to see you, and after that.

Wherever they are, they can converse with you easily. And for the owner, too, you can meet with your clients at any time of the day. There are no restrictions on where and when you can speak with your clients. Whether you're on a trip, at home, you can easily carry out your psychological counseling productively.

Setting Up an In-person Private Practice

Basically, all that we discussed on setting up a virtual therapy you will be needing for an in-person therapy, alongside a good location, which varies depending on the state you want to locate your practice. Also, the location and state will also determine the type and amount of tax you will pay. As such, we won't dwell too much on that. Instead, let's talk about transitioning from an in-person therapy practice to a virtual practice.

5.3. Transitioning Office Clients to Online

If you've signed up for this course because you already have a thriving in-person practice and want to turn that in to a full-time or part-time online practice, you should consider these following points:

- Determine whether you want an all-online practice or a hybrid (hint, all online is an easier transition)
- Make sure to update your Informed Consent paperwork for all clients, including online therapy. (I'll explain why later.)
- Add online therapy to your practice in a HIPAA-compliant manner (we will discuss everything about HIPAA shortly)
- When switching from freelancer to employee, nail your script for talking with clients about the transition. I'll be here to help you script your video if you're the one taking the course LIVE. Write out your script and send it to me, and I'll provide some feedback.
- If you plan to accept insurance in your online practice, ensure telehealth is covered at the same rate as in-person care. Otherwise, you'll need to talk to your clients about it.
- Create a clear transition plan and STICK TO IT. (More on this in subsequent lessons)
- Evaluate transition success rate; make adjustments as needed until transition rate is stable.

Still on helping you get clarity on your decisions, here is a question to help you:

If you knew there were no limits to the flow of clients and the quality of clinical care you could offer, what would you be?:

- Working only online
- A hybrid
- Working solely in person

Let's follow up on that question with a couple of other clarity-related questions. If you knew that you could earn the salary you wanted doing whatever you want, what would you be doing?

- Making a living solely from therapy
- Earning your living solely through other means
- Earning a living by combining the two (Ensure you provide answers to these questions.)

Now that you have clarity and certain of your decisions, let’s move on.

It's easier to move people online when you offer a full suite of online services rather than if you offer a combination of in-person and online services. Whether you are interested in offering your clients more flexible time slots or allowing them to access a therapy room from their home and office, online therapy affords much more luxury than in-person therapy.

First, when you decide to become an online therapist and announce this decision to your clients, let them know that it's not optional (except you are considering a hybrid), and if they stay with you, they will move online. If it’s not comfortable, you can always refer them to another therapist. Of course, you won’t tell your clients like that, but you have to ensure this point clear in your mind.

You could say:

“I'm excited to have made a decision regarding my practice. In 2023, I'll be moving my practice online so that I can see all of my clients in the comfort of their own homes and mine. I sometimes find myself working with clients who travel across cities. It's a feature of my practice that I really enjoy because it means that when you or I go on an extended holiday, we might be

able to keep meeting. It's a significant step toward me achieving the ideals I strive to help my clients achieve - a better work/life balance."

Or

"I'm updating my paperwork to include video sessions because I plan to transition entirely to video sessions within the next year. Before committing to video sessions exclusively, I'd like all of my clients to try them out. I have many clients who find remote therapy's convenience a real benefit. However, I want to be sure that it's the right option for you, my client, before we begin our sessions together. You'll see when and where I have these trial online therapy spots available on the paperwork. I'd like you to do at least one, but I'd prefer you do four before my full transition in 2023. So that we won't have any surprises, we'll have a chance to see if this relationship is a good fit. If it isn't, I want us to have time to work toward your goals before I move my office out of the area. I'd love to get that started in the next few weeks if you could fill out the sheet and tell me how many online sessions you'd like to do to feel confident and what days/times work for you"

Insurance and In-person Clients.

You will need to contact the insurance company to determine whether they reimburse for telehealth and, if so, at what rate. Preferably, talking to multiple people at the insurance company to get a clear answer. Unfortunately, some of them only have vague information about this on their website.

It's a hard call, but you're going to have to think about your values and goals for this one. Switching the person to a new therapist may be the best solution here. Perhaps this is the push you need to attract more cash-pay customers. Alternatively, you could keep them but offset the loss by increasing your fee, which would primarily affect your cash-pay clients.

They'll reimburse you if you can demonstrate that in-home/online therapy is medically necessary. And they'll help you transition to an in-person therapist as soon as possible. You might need to do some work with this one, but it could be worth the effort.

They make no mention of telehealth. Yet many clients will need to transfer to someone else because they'll have a hard time transferring from their $20 copay to your full fee. Instead of

assuming this will be the case for your client and asking them what they would like to do, you should ask them what they prefer. Remember, you've made the conscious decision to go online full-time and you're not alone. You are not the only therapist in the world and you can't fit your life around one or a few clients. Pick your life path—one that fits perfectly with your personality and values—and work hard for six months.

If Your In-person Clients Do Not Have Provision For Virtual Therapy

They can choose to see you from their car, request that their family step out for an hour each week (e.g., partner take the kids to the park or to dinner), or even video you from their office during their lunch break.

They have the option of seeing another provider. Some clients enjoy visiting your office. Respect their wishes if they are important to them. Assist them in connecting with someone who is the best fit for them. It's okay if that's no longer you. There will be a large number of new clients who will find your services to be the BEST fit they could ask for

Clients Have a Preference For In-person Therapy Over Online Therapy.

If they don’t agree, you can nod empathically and then ask, "What makes you feel that way?" You can empathetically share that you want them to feel comfortable and confident in therapy and that if they're concerned about feeling uncomfortable or feeling forced into doing something they don't want to do, you certainly wouldn't want to force it.

You can tell them that your transition will not be complete until the specified date, and that you are working hard to meet their goals before then, on the last day of the week reserved for in-person clients. Many clients will eventually decide to "test it out." Some people will not. That's perfectly fine!

Once you have made your decision to go fully, for effectiveness, you must stick with your decision. Don’t compromise on it, esle you will find yourself going back on your decision, Remember, you don’t have to go online at a swing; you can do it gradually until the transition is complete. However, you have to set som boundaries. Below is a couple of ways to go about it:

- **You must firmly draw hard lines in the office or online.**

So, let's say you decide to take Mondays and Thursdays off. Since you want to spend two days in the office and two days from home, Tuesdays and Wednesdays can be your work days in the office, or you could work from home on those days. You might also need to set boundaries for the number of hours you're willing to spend at each site, especially since people tend to favor the familiar, and you may feel more pressure to work longer hours on office days. As a way to help clients consider moving outside their comfort zones and trying out this new way of working, it may be helpful to have more flexible and desirable hours on your online days and a more stringent schedule on your in-office days.

They'll make time for therapy if they work with you because you're the perfect fit. And if not, it's okay to help them find another therapist whose business model is better suited for their comfort! You will get your ideal clients.

- **Timelines**

If you decide that you'll do mornings at the office but want all your evening or weekend work to be at home/online, this is great news for clients and will help them challenge the inertia of doing what's familiar (in-office work). Let your clients know that you're reducing in-person sessions so you can offer more convenient, flexible ones.

- **The Test Run**

Let's say that you decide to work from home for a month. You notify your clients, but communicate with them via e-mail (because they're "cool" with it). After March, you'll return to your office X number of days per week while keeping X number of days available for online sessions. You can inform them that they should contact you if they want to reserve one. This allows them to gain experience with online work without you framing it as a "trial," which communicates some negative aspects.

Rather than framing it as an inconvenience to your clients, frame it as an opportunity for them to spend more time with you even when you're working from home. Some of them may say, "eh, I'll just meet you at the next meeting instead of doing it online." Sure. But very few, if you really think through your script beforehand.

Moreso, you should not ofer discount when transitioning to online therapy. This conveys the message that online therapy is "less than" traditional therapy, and most clients will not choose it for that reason. Those who do will always feel they are receiving less than in-person therapy,

making it less effective. Make it clear that online therapy is not meant to be a stand-in for in-person therapy.

Below is a script that summarises how to infirm your clients about your decision to transition to online therapy:

Example Scripts

“I'm pleased to announce that I'll be transitioning to an online therapy. Through the wonders of technology, clients and I can meet in the comfort of our homes—potentially while one of us is away for extended periods or even in the case of within-state moves. We can continue our work together.

In addition to providing valuable information about your progress, this new format will provide a rich source of cues and nuances because I get to see you in your own environment while you work. You can tell I'm very excited about it.

I know seats are snapped up quickly, so I wanted to let you know as soon as possible.

For now, I'll be reserving my Mondays and Thursdays for online work and my Wednesdays and Thursdays for meeting with you in person. If you already know which of those days works best for you, let me know so we can lock it down!

Also, I wanted to let you know that I will be working fully from home in 2023 (slot your preferred date), so all sessions will happen online (unless there are clinical reasons why this wouldn't be a good idea). I wanted to give you a new consent that covers the specifics of online work today, so you could read it and I could answer any questions you had about it next week”.

Clients may respond to your idea of therapy online by saying, "Oh, okay - that sounds interesting and different."

To which you can reply, "Now, doing therapy online is not for everyone. For example, if someone doesn't have good wifi or doesn't have a private place to be able to talk from - that's not a good fit. It would also not be a good fit for someone who has psychotic symptoms or an abusive partner who may intrude on their privacy. Is there any clinical or practical reason why this might not be a good idea for you?

We want to create an environment where people feel comfortable saying yes, but not an environment where they feel pressured into saying yes. We don't apologize for online therapy, but we also don't push it on people. It's a tricky balance, but I'd like for us to talk through scripts together so you can find what fits you. Your values for your own life need to lead how you set up your business, and that might mean that your current clients don't fit with that, and that's okay."

Clients who are a good fit for your values and lifestyle will come to you if you live by them. Furthermore, no one is being sacrificed here. We can help others without sacrificing ourselves. Far too many people need assistance to believe that your boundaries will keep out all customers. People will find you no matter where you hide

Workbook Pages

/Link here Moving in Person Clients Online workbook/

5.4. Expenses, Budget and Finances

You'd agree that freedom and finances go hand in hand. Your cash flow determines the level of liberty you enjoy in your private practice; therefore, it is important to get clear on your finances. While doing so, you may be required to reduce your expenses to retain more or increase your earnings to avoid worrying about your expenses. Whatever your situation, we will discuss everthing in this section of the course.

Get ready to DREAM and PLAN and LIVE your JOYFUL LIFE!

Know Your Expenses

One of the drawbacks of starting your own private practice is accurately tracking your expenses. If you find that your practice is not yielding as much profit as expected or your expenses keep spiraling out of control, take a deep breath because it doesn't have to be that way.

You can control your practice' cash flow effectively by tracking down its expenses. It helps you cut down the money wasters and focus on only essential expenses.

Listed below are some expenses you to consider when starting your private practice or as you grow.

NOTE: It is NOT necessary to go out and implement all of these at once. In fact, it makes more sense to start small, and add more expenses as you go further in your practice after understanding what your needs are.

When starting out, it's important to write down your most common business expenses. It is part of your business plan. Expenses may vary from practice to practice but the common cost you will likely tackle are:

- **Utilities**: this expense depends on your leasing contract. Your contracts may require you to pay for electricity, internet, gas, and more.
- **Phone system**: you can decide to incorporate virtual calls and voicemail systems into your practice. Grasshopper is a good option. It is a voice-over-internet-protocol (VoIP) that masks your personal phone number while carrying out the full functions of a good phone system. It is easy to use and scale with your growing practice.
- **Rent**: This is as a matter of fact an unavoidable expense. It can range from a physical office space to a space on the web for telehealth. Whichever one you choose, ensure that it is something your new/growing practice can afford.
- **Yearly/One-time costs**: it includes furniture or a copier/printer for your office. Goodwill and Facebook Marketplace have been valuable resources that have furnished many private practices.
- **Google Ads**: You don’t need to run ads immediately, but it may be a good idea to budget for some marketing expenses.

Other less occurring yet vital expenses to consider are:

- **Insurance**: this includes personal health insurance, business insurance, malpractice insurance, etc.

- **Accounting**: an accounting software or accountant for monthly expenses tracking and tax preparation.
- **Billing software**: it includes invoicing/billing software for private pay clients and making insurance claims.
- **Website**: This expense covers your web design and hosting.
- **Marketing**: your marketing expenses will cover online advertisements as well as SEO, SEM, Copywriting, etc.
- **EHR software**: an electronic health record system for managing patient databases.
- **Legal Fees**: this will cover documentation creation and other legal aspects of your practice. This expense will also protect HIPAA-compliant equipment and systems incorporated in your practice.
- **Networking fees**: this expense covers costs for conferences and reputable board memberships.
- **Payroll costs**: you will have to consider this expense if you will take on extra staff in your practice.

/Here's a budget sheet to use as you plan and get started./

Get Clear on Your Goals

After getting your most significant roadblock (expenses) out of the way, the next step is to think about your goal and how to achieve them. It will require us to think strategically about marketing strategy, fee setting, and budgeting.

Clarity: The income you NEED, WANT & DREAM OF

When it comes to hitting your financial goals, you must understand where you are, where you need to be, and where you dream of/ want to be. When these parameters are clearly defined, it is easy to create a strategy based on your current situation to help you hit your desired goal.

Let's start with the first parameter. Where are you currently? It entails you coming head-on with the present health of your private practice. Are you currently:

- Getting ahead (headway on the principle of loans/banking savings)?
- Breaking even?
- Falling behind?
- Do you have a cushion?
- Is there room for savings?

This question should prompt answers like:

- Even if I never make money, I am good.
- I have some savings. With current expenses, I could go X amount of time before savings are gone, or with everyday expenses, I could go X amount of time before savings are depleted enough to make me nervous.
- What savings? I am just breaking even.
- We are/I am deep in debt. There's no room at all.

After stating the present state of tryout practice, the next step is to define your income needs. It will require you to state the non-negotiable amount your practice should have made within a specific time frame. For example:

- Within 3 months, I need to make X per week.
- Within 6 months, I need to make X per week.
- Within 9 months, I need to make X per week.
- Within 12 months, I need to make X per week.
- Within 24 months, I need to make X per week.

Once your needs have been clearly defined, you can go on to list out your wants. For example:

- Within 6 months, I WANT to make X per week.

- Within 12 months, I WANT/DREAM to make X per week.
- Within 18 months, I WANT/DREAM to make X per week.
- Within 24 months, I WANT/DREAM to make X per week.

Note: While listing down your needs and wants, list reasons why your finances should be so.

The next reasonable step after listing out your needs and wants is to determine how many clients and what rate will help you hit your financial goals. Download my formula to get started.

- NEED: # client's/$ rate
- WANT: # clients/$rate
- DREAM OF: #clients/$rate

Click the button below (Please open it, go to "file," make a "copy" into your google drive, and have fun playing!)

/Here's the Formula/

Marketing Strategy based on your Financial Realities

Now that you know your financial reality, you want to create a marketing strategy based on your unique situation and goals. It may also require you to limit your advertisement from person to person or use online tools like websites, social media, Seo, email marketing, and so on.

Investing In Your Practice Nonetheless

When running a new counseling practice, it is easy to get caught up in cutting down expenses that you forget to invest in your business. Finding the time and few resources to invest in your practice will go a long way. This investment can be in the form of Psychology Today membership, which includes access to the directory's resources and blogging ability (e.g.iTherapy). You can also upgrade your video meeting platforms to Zoom or VSee.

Now you understand the financial condition of your private practice, how do you reach your goal? How do you walk through your present financial realities in the shortest possible time?

Keep Your Expenses at Bay

Expenses are unavoidable in any business, and it is no different in your private practice. However, you prevent your costs from spiraling out of control such that it becomes way more than your income.

Ensure that you list your every day and one-time expenses as explained in the previous section. Then go on to distinguish between your necessary costs from money wasters. Some money wasters may be in software Billings and subscriptions from communication platforms (video conference, virtual telephone systems, etc.).

To cut down costs, you can

- Opt for a free video offer from doxy.me or other platforms,
- Exclude Electronic Health Record Software, and
- Keep client records on paper or computer.

You may also opt for an all-in-one platform like iTherapy, CounSol, and OOTIFY that allow you to handle the financial, health, and administrative aspects of your practice in one place.

These adjustments may be somewhat uncomfortable at first but can impact your cash flow for the better. You can add them once you have healthier finances.

Get More Clients

You can get more clients through networking or online platforms like Open Path, Open Counseling, Better Help, Talk Space, OOTIFY, and Breakthrough. You can take advantage of what these platforms have to offer so you can get more clients and be on your way to improving your finances. These online resources are also an excellent way for new private practice owners to get one or two clients to boost their confidence and experience.

Increase Your Fee

Increasing your fee is one way to improve the cash flow in your private practice. However, if you hesitate to make this decision, it could be due to the following:

- Compassion
- Fear
- Worth

It is essential to identify the unique obstacle preventing you from making changes to your fee and work on them.

Is there anything you can add to YOUR… Private Practice Planner to remind you of your policies around this?

Fee Setting and Reduction

Every private practice is founded on specific VALUES and VISION. If your vision is to offer reduced fee spots for particular clients (people who cannot afford full fees), but your financial condition makes it hard to accomplish, there is an easy way around it!

Having clearly defined YOUR financial reality and needs and wants, here are some of the best approaches to incorporating reduced fee spots in your practice. I'm going to explain these approaches alongside their pros/cons.

Scaffolding Approach

This approach to reducing fee spots requires you to pick a fee, pick the clients you can offer it to, and set a boundary.

For example, you might write in YOUR… Private Practice Planner, under the Finances Tab, something like this:

- **Full Fee**: $125
- **Reduced Fee**: $70 (2 spots)
- **Super Reduced Fee**: $50 (1 spot)

You can go on to be more specific when writing. For example:

- **Full Fee**: $125 {Note in the paperwork that fees may increase no more than twice per year - usually January and June - with advanced notice of at least 8 weeks)
- **Reduced Fee**: $70 (2 spots) {Offered for 12 sessions with an escalation plan of $10 per session (or month) until the fee hits full fee rate}
- **Super Reduced Fee**: $50 (1 spot) {Offered for 12 sessions with an escalation plan of $10 per session (or month) until the fee hits full fee rate}

When you get a call about therapy, and the person says that they cannot afford your rate, you can easily say, I have one spot for reduced fee sessions left at $75 a session. That is available for 12 sessions. Will that work for you?

Pros

- Simple.
- It is built around your vision, values, and financial realities.
- Easier to set boundaries than other methods.

Cons

- Escalating your fee takes time, and it is systematic. It will require vigilance after the reduced fee timeline is over.
- Someone might take a reduced fee spot they don't need, leaving it unavailable to someone who does.

Sliding Scale Approach

If you worry about people taking advantage of your reduced fee spots when they don't need them, or perhaps you need a more formulaic approach to assigning reduced fee spots, the sliding scale approach is for you.

The sliding scale approach fee setting is charging your clients based on their financial capabilities. This method allows people with lower income to conveniently afford your services.

Just a quick warning that reduced fee spots may not be the best course of action when billing insurance. The inconsistency in the fees for your different clients opens you to the risk of being called out for insurance fraud. What I would do in a situation like this is only to offer reduced fee spots if my practice only accepts private pay.

The American Psychological Association also offers some advice about providing a discounted rate

/Offer A Financial Break/ APA article

Your values and vision for your private practice should determine the fee setting and reduction approach you employ. In my case, staying clear of complications and bureaucracy are part of my core value; hence, this particular method of sliding fees was not for me.

Check in with your values and your plans about insurance to see which of these discounted or reduced fee spots might be for you, if any.

Pros

- Fair
- Systematized

Cons

- You may feel locked into the fee if your client's financial situation doesn't change over time.
- It's a complex and more time-consuming system.
- It requires you to ask your clients financial questions.

Where do you find your reduced fee clients?

After choosing the best approach for a fee reduction, it’s time to find your target clients. There are many directories out there that give you access to unique clients, but I highly recommend **Open Path**.

It is a free directory aimed at helping people who cannot afford typical therapy rates to get matched up with therapists offering a reduced fee spot or two.

They have a cap at which you can set your rates. The only thing they ask of you is that if a client contacts you who is a good fit for your service, you take them. You are also encouraged not to charge clients in advance. Note that this directory is not used to build your SEO but to provide a service.

One of the perks of using Open Path to find your reduced-fee clients is that they do a little of the vetting for you. Their built-in matchmaking system ensures that the people you get pairs with truly need a discounted rate.

Aside from Psychology Today, I got more calls from Open Path than any other directory. However, I had to carefully screen clients to ensure they were appropriate for my practice. It was truly worth it.

I also had a former client complain of the inability to afford my rates. I asked her to go through the Open Path process and funneled her into my practice through them. It was a great option that not only allowed me to see the client but also made me feel more confident that she truly needed a discount at the same time while fulfilling my obligations to Open Path. Once your reduced fee spot is full, you can mark it on your Open Path profile.

As an Open Path me never, you also enjoy discounts from other products like a free three-month listing with Good Therapy.

My advice?

Wait until you get your directory listing copy in point before joining Open Path. After joining, take advantage of the free Good therapy listing. Set a reminder to cancel your membership if it doesn’t yield clients for you. We'll be talking more about the advantages and limitations of directory listings soon!

WORKBOOK

/Finances & Fee Setting/

5.5. Payment Structure

When starting your private practice, you will be faced with choosing either private pay, insurance, or a hybrid payment approach. In my experience, the more you niche down, the more you can command private pay prices. The broader private practice that you have, the more chances are that you'll want to have a hybrid approach.

Nevertheless, every financial decision you take in your practice should tally with your values and visions, including providing services through insurance panels.

To help you understand what to expect when using insurance panels, below are its lists of pros and cons.

Pros

- ❖ You will get more clients quickly and consistently.
- ❖ Insurance companies are starting to reimburse for telehealth.
- ❖ Some states have parity laws that require insurance companies to reimburse telehealth at the same rate as in-person therapy.
- ❖ If you are used to dealing with insurance, the learning curve here is not much as there are only two changes to your superbills for telehealth.

Cons

- ❖ If you haven't paneled before, you are learning a new language while trying to start a new business.
- ❖ It is a little easy about working with insurance companies

- The time it will take you to fill out the paperwork to get paneled could have been used to go HARD at marketing and fill a private pay practice
- If you are an anxious person, you will fear "messing up" with insurance in a way that causes you to be a perfectionist while filling out their paperwork.
- It is time and energy-consuming.
- You will get reimbursed at lower rates than you deserve.
- They can control, to some degree, the number of private pay clients you see.

Now let's return to your practice vision board. Is there a part of you that finds it morally essential to provide services through insurance panels? Or the opposite, do you find it morally concerning to provide therapy through insurance panels?

Quick Tip:

When it comes to choosing an insurance company to credential with, you should choose one or two insurance providers that have the highest reimbursement rate for your state. You may want to start with private pay while credentialing with an insurance company or two and re-evaluating where you are once credentialed. If your private practice is booming, there may be no need to go the insurance route. If you're not built up to the number of clients that you'd like, then you'll have the insurance clients to fill appointment spots.

Insurance Panel Vs Private Pay Vs Hybrid

Deciding whether to use an insurance panel, private pay, or a hybrid model of payment in your private practice can go a long way to affect your finances.

If your primary revenue model is insurance reimbursements, the only way you can go to increase your revenue is to see more clients. Although paneling with insurance companies may help grow your caseload, however, your earning potential is reduced because you have a limited amount of time to see clients.

If your value requires your counseling practice to be mostly insurance based, then the way to scale your business is to hire more professionals for your practice so you can see more clients.

If you opt for a private pay model instead of insurance, you will enjoy flexibility in increasing and reducing your fees. Many prefer this option as it affords the luxury of seeing fewer clients for the same earnings as an insurance-based practice will get.

Practices that run on a hybrid model (incorporating both private pay and insurance panel) feel like they have the best of both worlds. This model works fine if you stick with the predetermined number of insurance appointments out of the total number of clients.

Superbills and Out of Network

There is a way to "split the difference" concerning insurance. You can choose NOT to get paneled with insurance companies but offer your clients a document called a superbill. It is a unique invoice that provides the client with all the information they would need to submit (themselves) to their insurance company to see if they could be reimbursed for part of their fee.

The issue with using superbill is not knowing beforehand if the insurance is indeed going to cover the service. Nevertheless, try to be transparent and keep things simple for your clients by telling them that you want them to choose to work with you if they can comfortably afford your rate. You can also go further to let them know that the chances of reimbursement by their insurance company would be "icing on the cake" but not required for them.

Pros

- It's always nice that clients might be able to put money back in their pocket
- It keeps your side of the equation pretty simple (I'll give you all of my superbill templates and cheat sheets)

Cons

- You are still dealing with insurance companies. They will still want to call and verify things.
- You'll need to get releases to have those conversations
- There's a bit of extra work administratively

- ❖ They can ask for your records or do some sort of audit just as they might if you were paneled.

Workbook

/Multiple Rates Income Sheet/

Module 6: Compliance and Risk Management

As a private practice owner, you will be dealing with sensitive information of your patients. Your clients will trust you with some confidential information that must not fall into the wrong hands. As such, there are rules and regulations guiding the use of your patients' information.

These rules protect your patients' privacy and health members, improve efficiency in the healthcare private industry, enhance the portability of health insurance and ultimately, ensure health information is kept secure and patients are notified of breaches of their health data .

Violations of these regulations can attract severe consequences legally, which may lead to you losing your license of practice. To avoid this, you need to understand the rules and regulations that guide the practice. You need to abide by them always. Hence, in this module, we will look at these rules and regulations, their importance, how they apply to you, and how to reduce exposing yourself to potential risks.

However, let's consider what you should know about Protected Health Information, PHI, and what it entails.

6.1. Protected Health Information

Protected Health Information is simply the personal information of your patients. It includes all the health information created, received, stored or transmitted by HIPAA-covered entities and their business associates. In this context, the HIPAA-covered entity is you, the healthcare provider. And the business associate is your client, patient.

As a private practice owner, it's your duty to ensure, at all times, the integrity, confidentiality and availability of PHI. Here is a quick list of things that are considered individually identifying;

- Names
- Vehicle Identifiers (e.g., license plate)
- URLs
- Location smaller than the state
- Medical Record Numbers
- IP Addresses
- Dates of Service
- Biometric Identifiers (fingerprints)
- Telephone Number
- Insurance Numbers
- Fax Number
- Email Addresses
- Account Numbers
- Photos
- Social Security Numbers
- Certificate/License Numbers
- Medical Records Numbers
- Any other unique identifier

You can as well check this PDF link to know what's covered in the PHI.

Basically, your client is confiding in you with all this vital information. It's your duty to respect their trust by protecting the information.

Now that you've seen what we regularly engage with during the practice, let's talk about how individually identifying information connects to the concept of Protected Health Information.

NOTE: The information below is taken directly from the U.S. Department of Health Information Privacy. You can link here for this information and more:)

> "The HIPAA Privacy Rule protects most "individually identifiable health information" held or transmitted by a covered entity or its business associate, in any form or medium, whether

electronic, on paper, or oral The Privacy Rule calls this information Protected Health Information.

Protected health information is information, including demographic information, which relates to the individual's past, present, or future physical or mental health or condition, the provision of health care to the individual, or the past, present, or future payment for the provision of health care, and that identifies the individual or for which there is a reasonable basis to believe can be used to identify the individual."

"For example, a medical record, laboratory report, or hospital bill would be PHI because each document would contain a patient's name and/or other identifying information associated with the health data content.

By contrast, a health plan report that only noted the average age of health plan members was 45 years would not be PHI because that information, although developed by aggregating information from individual plan member records, does not identify any individual plan members, and there is no reasonable basis to believe that it could be used to identify an individual.

The relationship with health information is fundamental. Identifying information alone, such as personal names, residential addresses, or phone numbers, would not necessarily be designated as PHI. For instance, if such information was reported as part of a publicly accessible data source, such as a phone book, then this information would not be PHI because it is not related to health data (see above). If such information was listed with health condition, health care provision or payment data, such as an indication that the individual was treated at a certain clinic, then this information would be PHI."

Before it gets overly complex in your mind, keep two things at the forefront:

- Identifying Information (it has to give away a particular person),
- It can either be health care information OR payment information about health care services (invoice).

In simple terms, your clients' information must always be protected. In fact, some details must be protected from your staff. You don't have to memorize the whole PHI list, you just have to ensure you don't give out or release any piece of information or combine information that can directly identify any of your clients. You must protect your client's privacy around health information.

However, if you need to share any information at all, ensure it is through HIPAA. HIPAA has a secure means of sharing information without releasing important details about the person. Also, if the client agrees to a less secure means of sharing, after understanding the risk associated with it, then you can send it.

Now that we are clear on PHI, let's discuss HIPAA and how it protects this health information.

6.2. HIPAA and BAA; What You Should Know

What's HIPAA?

NOTE: The information below is taken directly from the U.S. Centre for Disease Control and Prevention Website. You can link here for this information and more:)

"The Health Insurance Portability and Accountability Act of 1996 (HIPAA) is a federal law that requires the creation of national standards to protect sensitive patient health information from being disclosed without the patient's consent or knowledge. The US Department of Health and Human Services (HHS) issued the HIPAA Privacy Rule to implement the requirements of HIPAA. The HIPAA Security Rule protects a subset of information covered by the Privacy Rule."

HIPAA Privacy Rule

"The Privacy Rule standards address the use and disclosure of individuals' health information (known as protected health information or PHI) by entities subject to the Privacy Rule. These individuals and organizations are called "covered entities."

The Privacy Rule also contains standards for individuals' rights to understand and control how their health information is used. A major goal of the Privacy Rule is to make sure that individuals' health information is properly protected while allowing the flow of health

information needed to provide and promote high-quality healthcare, and to protect the public's health and well-being. The Privacy Rule permits important uses of information while protecting the privacy of people who seek care and healing."

In simple terms, HIPAA rule creates a set of standards to patients' personal medical records and health information. It ensures proper use of an individual's personal and medical records. With HIPAA rules, you can be certain your personal data is safe and secure.

Major Key Elements:

- Continuous insurance coverage for workers who lose/change jobs
- Simplification in processing electronic healthcare transactions
- Combat abuse, fraud, and waste in healthcare

Am I a HIPAA-Covered Entity?

There is a checklist to help you know if you are covered by HIPAA, however, you should read this article before going through the checklist. This article is important and will help you understand the checklist better.

/Read this Brief Article to see if you are a HIPAA Covered Entity/

Now you can go through their checklist to see if you are a HIPAA-covered entity.

/Click here to see if you are a covered entity/

However, Federal and state laws may not match when it comes to what you need to do to protect the privacy and security of medical data. Surprising, yeah?

Strive to maintain the best privacy and security you can, and use your informed consent process to balance the practical issues of providing services and communications online with the aspirations of providing perfect security and privacy.

What Does it Mean to be HIPPA Compliant?

HIPAA Compliance, to start with, is an ongoing standard that healthcare providers must include in their practice to ensure the safety, integrity and confidentiality of protected health information, PHI.

In summary:

- Medical Data Privacy: limits use/disclosure of PHI, rights to receive
- Medical Data Security and Safeguarding (how we store the records and how we keep them safe)

Usually, the first step to becoming HIPAA compliant is getting covered by HIPAA itself. However, it's not compulsory to be covered to be compliant with HIPAA.

There is no checklist to know if you're HIPAA compliant or not. But you can read this short and interesting article to know more about HIPAA compliance.

/I want YOU to read this article/ link here

Why You Should Care HIPAA

The most important reason is that, as a private practice owner, you should work towards protecting the information your clients confide in us with. To do that, HIPAA provides proven measures and guidelines. Complying with HIPAA GUIDELINES is way cheaper and easier to protect your clients. This is because these agencies have lots of money to throw at exploring ways to do that, and more importantly, they have more experience in this aspect of security and privacy than most private practice owners.

Moreso, if you were to be investigated by an ethics committee or by state/federal law, one of the things your actions are weighed against is "what would similarly trained professionals have done in the same circumstances?" Guess what? Most private practice owners bill insurance. This means that they are HIPAA-covered entities.

Basically, your security and privacy actions will be weighted against those who are compliant with HIPAA guidelines. Hence, you should ensure you comply with HIPAA.

Why You Can Trust HIPAA

The original HIPAA was not particularly that good because patients and clients were complaining about it. They wanted to be able to email their provider and share records and clinical information over email or other electronic means. And they felt that their patient's right to access their provider and their clinical material was being impeded by HIPAA.

So, HIPAA made a change. They brought in the OMNIBUS rule which created these modifications.

Modifications of HIPAA

Business Associates are directly liable for compliance. This means that if someone signs a BAA with you, you are no longer the ONLY ONE carrying liability for security and privacy. They are too. And you'll have a BAA with every service provider you use (email, phone, fax) should you decide to function as a HIPAA-covered entity.

Expand individuals' rights to receive electronic copies of their health information and restrict disclosures to a health plan concerning treatment for which the individual has paid out of pocket in full.

This is where HIPAA tells us that as long as we provide options to our clients, they can OPT-IN to a non-secure means of communication. The trick here is that it has to be an OPT-IN, not an "OPT-OUT". Meaning, that you can't say, "Unless you tell me otherwise, I'm going to use my Hotmail account to email you."

You can say, "There are many ways we can connect, here is a list of some that I use from more secure to less secure, and we can always explore others if these don't work for you. Which would you prefer? Initial all that work for you." Or something to that effect.

Watch the VIDEO for more detail.

Some ways to transmit or store Protected Health Information include:

- Video
- Email
- Phone
- Fax/Scanner
- Health Records Storage Plan
- Invoicing & Receiving Payment

These are companies with whom we will seek a BAA OR we will make sure we have a HIPAA secure option and offer an opt-in to a non-secure method.

There is a lot to learn about HIPAA but we may not be able to cover everything in detail in this course. However, for more understanding of the HIPAA, below are some reading links:

HIPAA Covered Entity

Great Article: CLICK HERE

HIPAA and BAAs

Great Article: CLICK HERE

All Things HIPAA, PHI, BAAs

Great Article: CLICK HERE

NOTE: If the concept of HIPAA fascinates you and would love to read more about it, below is a reading for you.

HIPAA 'Protected Health Information': What Does PHI Include?

Workbook Link

/HIPPA Security Plan of Action/

What's a Business Associate Agreement, BAA?

A business associate agreement is a legal contract between an organization or companies and health care providers that will receive, transmit and store public health information as part of its services. In simple terms, it's the agreement that the companies or people you work with enter.
This agreement is what ensures that these providers must, by all means necessary, protect the PHI and details of your clients. Although you will not know the details of how they protect these records, you can be certain they will do it to the best of their ability, as it is legally binding.

Remember what we talked about in the HIPAA OMNIBUS law — the BAA is the company or person saying, "I take the protection of your client's information so seriously, and I'm willing to take on some of the liability if we mess up. That's how strongly I feel about my security".

No company should provide HIPAA compliance without giving you a BAA, Sometimes, you may have to request for it, but they should already have one. If they won't give you a BAA, they won't count as HIPAA compliant. And therefore, neither will you.

This is very important for you and your practice. Ensure whatever company you will be working with, iTherapy, Theranest, G-suite, Square Up, etc., give you BAA. As well as anyone who may come into contact with your PHI and Health Records, like your supervisees, Interns, etc.

Usually, you should not have to develop a BAA by yourself as the HIPAA provider you work with should have one ready for you. However, if needed, here is one developed by NASW.

6.3. Liability Insurance

Liability insurance is another key aspect of your legal framework. Like every other type of insurance, you need insurance to minimize exposure and damages to yourself and your practice.
General liability insurance will cover common business risks like property damages, advertising injuries, customer injuries, etc. Anything can lead to lawsuits. Ensure you have this in place to protect yourself in case of any future issues.
Basically, liability insurance provides coverage of three different types for your therapy. They are:

- **Client Injuries**

If any of your clients slips and breaks their arm in your clinic, you could be blamed for it. And in some instances, the client could file a lawsuit and make you pay for the medical expenses. When you have liability insurance in place, it covers the medical fees, funeral expenses in fatal incidents, and even fees for an attorney should you need to hire one.

- **Client Property Damage**

If your clients' properties get lost, or damaged, your practice could be held accountable. General liability insurance, if in place, will cover fees to repair damaged items, replace damaged items, and legal fees from related lawsuits.

- **Advertising Injuries**

In case of unintended plagiarism of competitors' logo, slogan or content during advertising, general liability insurance will cover for any damages that may result from it.

In summary, you need liability insurance for your practice. Deciding when you need to get it is up to your own level of risk tolerance and what your ethics and state regulations have to say about it (if anything).

6.4. Choosing Your Software

Electronic Health Record software (EHR)

Many practitioners in private practice use Electronic Health Record Software (EHR) to maintain productivity and finance, and you should too. An EHR is the digital version of a patient's medical file where information about their health can be recorded and updated in real-time. It is a patient-centered technology that allows you to store sensitive data about your clients and only grant access to authorized users.

While an EHR is a leap into the future for private practices, your success strongly depends on choosing the right Electronic Health Record software (EHR). The general function of this digital recording software in your practice is to:

- Schedule clients' appointments
- Create easy communication with clients

- Organize clients' paperwork
- Adequate patient billing, and
- Submit an insurance claim

An EHR is a powerful tool that will help you effortlessly manage the medical and financial parts of your practice. Due to their enormous importance, there are certain features of an EHR that YOUR Private Practice needs. They are:

❖ Credit Card Support

Before incorporating an Electronic Health Record system into your private practice, you would want to ensure that it can collect payments from credit cards (including debit and HSA debit cards). To make room for more flexibility, you can also look out for non-card payment options like Stripe or PayPal.

❖ Adequate Claim Submission

Submitting and processing an insurance claim is one of the most daunting activities in private practice, however, a good EHR should relieve you of this stress. This system should have a simple and seamless way to submit claims and follow through with the process until you are reimbursed.

- **Trustworthy and HIPAA Compliant**

It is important to build your practice on the foundation of trust and integrity, hence the need to use an EHR software that upholds the same values. One of the non-negotiable features of a good EHR software is to be HIPAA compliant as it follows adequate standards for your clients' privacy and protection.

- **Seamless Scheduling**

One of the biggest time wasters for private practice owners is scheduling hence the need for an automated system to handle this for you. When choosing an EHR for your private practice, you should ensure that it offers a seamless scheduling experience both on you and your client's end.

However, for automated scheduling to be possible, you'll need to opt for online scheduling if you don't already.

Automating your Private Practice: Piecemeal or All-in-one Platform?

Using a fully automated EHR solution in your private practice is dependent on the size of your practice and your budget. Some private practices can afford to pay the monthly fee required to run a fully automated system while others cannot. Because of these differences, you are now faced with two options which are to go "one-stop-shop" or piecemeal each component of the EHR system.

Going automated in your private practice using the one-stop-shop method means getting an all-in-one platform that can handle the health, financial and administrative tasks of your practice. The good thing about all-in-one platforms is the convenience they offer. They take away the stress of constant decision-making transitioning to an automated practice. With just a monthly subscription, you can get access to unique features that allow you seamlessly carry out billing, health record, online meeting, appointment scheduling, and many more.

While an all-in-one platform may seem like a great deal, it is a big financial commitment causing many to opt for the piecemeal method where software and systems are added to the practice one at a time. This method gives you the liberty to adequately research and weigh your options to get the best deal.

If you are not comfortable with both "one-stop-shop" or "piecemeal," there are other options. Some examples are **Theranest and Simple Practice**, which both are only used to provide online health recordings. Later on, they added invoicing and billing and, much later, video support. However, they still do not include HIPAA-compliant email, phone, directory listings, etc.

So, think about it, which one works best for you? Is it piecemeal? An all-in-one platform? Or something in between?

Video Platforms

Like we discussed earlier, choosing to function as a HIPAA-covered means the system you incorporate into your practice has to be HIPAA-compliant. That is, it must meet the security

standards deemed by HIPAA. These platforms may have access to your clients' Protected Health Information (PHI), hence the need for them to be HIPAA compliant.

How then can you tell if a video platform is indeed HIPAA compliant? Note that many popular virtual meeting platforms are not licensed mental health providers, hence, and are not bound by law like you to protect patients' health records. However, they must possess a Business Associates Agreement (BAA) that proves that they are truly HIPAA compliant. Having this agreement is basically them saying that "Hey, I'm not a licensed mental health provider, but I promise to treat this information as if I was."

When using an all-in-one platform, go the extra mile to research who they subcontract each piece of their system to for security measures. For example, iTherapy uses Zoom.

Some HIPAA-compliant video platforms are:

- Doxy.me
- VSee
- Zoom

Zoom

This video platform is great for those seeking flexibility when it comes to virtual meetings. It is great for confidential consultations, group therapies, and webinars. For your private practice, it is best to stick with the HIPAA version of zoom and it is expensive for an individual user. The cheaper alternative is to get zoom from another company like iTherapy or Regroup.

Regroup sometimes offers a FREE package that includes the use of Zoom. If you want to check it out, here is a link below.

https://personcenteredtech.com/vendorreview/regroup-therapy/

Zoom Video and many other features are included in iTherapy's basic package (at the time of this course writing) for only $80.00 a month. Learn more about the service or sign up with them via the link below. Mention this course to get a discount.

https://itherapy.com/

Doxy.me

Unlike most video platforms out there, Doxy.me requires no download to be able to work. Virtual meetings and video conferences can be carried out on the website saving both you and your clients from any form of hassle. While this feature may seem great, many therapists have shown dissatisfaction with the fact that it requires no download.

The platform generally delivers optimal performance when there is a strong signal. However, its performance is quite unpredictable in rural regions or places with low digital strength.

Vsee

This video platform is very similar to zoom in many ways apart from not allowing three or more people in a session. It is a great alternative for zoom and has slightly higher reviews when it comes to international practices.

Which is the best?

The three platforms listed above are top-notch and HIPAA compliant. You cannot go wrong with any of them. However, you can lean toward Zoom or VSee just because they have more reliable connections when your client doesn't have a strong internet connection.

Your decision should be solely based on your unique need. Many people have been perfectly satisfied with each of these options. Know that there is always room to change your video platform as your practice grows.

Email

Before choosing an Email platform for your private practice, you should know that HIPAA compliant feature for email is a bit of a misnomer. This is because there is really no HIPAA standard privacy for sending and receiving mails. These messages live on your phone, on computer history, on the cloud, in the communication channel between you and your client’s account and each of your servers. When you look at these locations carefully, they do not guarantee optimal protection of your emails.

So, when choosing an email platform for your practice, preferably, make an informed choice. This short and informative article can give you a head start. We will discuss this in the group

Check the article here.

What then is the best email platform for your private practice? There are couple of secure email platforms you can use in iTherapy or independently and they are:

- Hushmail
- G Suite

Hushmail

This is recommended hushmail because it has the option to password protect and encrypt each email. When it comes to HIPAA-compliant email, they are the gold standard. However, you should know that emails sent via Hushmail are not completely protected from the receiver's end. That is, while it is safe on your computer with a password, and it passes through an encrypted tunnel to get to the receiver, once it gets opened, it automatically stores on the email server.

Due to this factor, ensure that you have your client's consent in using this means of communication with them.

G Suite

This is an inexpensive and great email platform you can incorporate into your practice. Some of your clients may prefer this medium, hence the need for the HIPAA-compliant version. You can do this by simply securing a BAA and following the steps in their workbook.

Although the G Suite platform is quite inexpensive to adopt, it requires a bit of a process to set up. Like Hushmail, this platform stops being secure when your client opens their mail. The way around this situation is for your client to also have a G Suite account.

Other options:

The alternative to using email is sending and receiving messages via client portal. You can use this communication feature on **Theranest and Simple Practice**. They are generally safer than email as they offer the "secure text" option which protects the messages on both ends even after they are opened. An example of this secure texting platform is Signal.

Signal

It is easily the most secure communication system in the market, and it is 100% free. According to Roy Huggins at Person Centered Tech, Signal does not offer a BAA since it actually meets or exceeds HIPAA guidelines without one! Want to learn more about Signal?

https://signal.org/

Phone calls/Texting

Let's start with an overview of the various ways we use the phone with our clients. There is communication via landline, cellular connection (e.g. LT, 3G, 4G), or via the internet (Wi-Fi, VOIP).

We'll discuss each of these telephone communications channels and their security features. However, before then, Below are a few of the potential risks we face by communicating with our clients via telephone. They are:

- Sending message to the wrong person.
- Third-party intruding on your privacy when using public Wi-Fi.
- Clients' contact and PHI lost or stolen with the device.
- Easy access to your phone by a partner or family member, thereby accidentally jeopardizing your client's privacy.

You can jot down a few others that you can remember! Now let's move on to some of the security features of various telephone communication channels.

Landlines

While these devices may be seen as the most secure of all options, they are not very practical since they are no longer in use today.

Cellular

These devices are almost close to landlines in terms of security features making them the second most secure device for communicating with clients. For this reason, we do not need to use a BAA with them. You should note that these devices are only the second safest devices when used with a cellular network and not with Wi-Fi.

Voice over Internet Proxy (VoIP)

Voice Over Internet Proxy (VoIP) means using an internet connection on your phone to make a call via a software. When using this means of communication in your counseling practice, you should ensure that the VoIP software is HIPAA compliant or has a BAA.

There are not many options for HIPAA-compliant VoIP but here are a few of them:

- RingRX (Tip: Don't opt into getting voicemails by text or email, retrieve them from a secure portal online).
- Ring Central (Tip: save cost by using it in iTherapy since the HIPAA-compliant version is expensive on its own).
- 8 X 8 (Tip: Turn off the feature that allows voice messages or faxes to be sent via email as it would render it non-HIPAA compliant. If you must use this method, give your clients the option of informed consent)
- Spruce (Tip: If you plan to text, ask clients to download the free app so that they text you securely. Otherwise, the program will send texts from your app to their regular text messaging, which is not as secure).

Should you choose a phone option without a texting feature or are unsatisfied with the security of the texting feature (Spruce)? Instead, you can get the **SIGNAL** free app. It is secure, and it does not even require a BAA.

Security Tips for Phone Communication

There is no official set of rules for HIPAA compliance for phone calls. Landline phones and cell phones used only on a cellular network, hence are assumed to be secure and do not require a BAA. However, it is advisable to use a HIPAA-compliant VoIP or one with a BAA to communicate with clients.

Again, remember that securing your client's information goes beyond using HIPAA-compliant software. You can also take practical security measures like:

- Not leaving your cell phone carelessly.
- Protecting your device with a password.
- Limit password sharing or if possible, do not share.
- Use two-factor authentication for apps with PHIs.

- Activate the "find my phone" app on your phone in case of loss.
- Activate the "delete my phone" app so that if your phone is lost you can delete all information on it from your computer.
- Use only secured and private Wi-Fi when communicating with clients.
- Do not grant apps access to your phone contacts or keep clients' contacts in your HIPAA-compliant software.
- Don't view faxes on your phone as it can store that information in a non-secure location on your phone.

Fax/Scanning

Sending and receiving documents electronically is best done via the client portal of your HIPAA-compliant electronic health recording system. Some EHR systems that offer this feature are Simple Practice and Theranest.

There are several options for HIPAA compliant Fax to Email or Email to Fax services. Some include:

- 8X8
- SRFAX
- RingCentral
- Faxage

The faxing outside an EHR system will require an electronic version of the document to first exist on your computer before sending it to the recipient. This means you will need to scan it to your computer or take a photo of it and save it to your system. This process alone has innumerable security risks hence the need for a HIPAA Compliant scanner as well.

For now, Forcura is the only scanner with HIPAA-compliant claims. You can use this scanner or any other scanner offering a BAA. However, before using the latter, make sure that you ask the company where they store their scanned data. If you receive no satisfactory response to this question, give your clients the option of informed consent where they can choose to "opt in" to less secure transmission of information.

Before scanning any document to your clients via a non-secure means, ensure that they sign a line on your informed consent to do so.

Some non-secure scanning options include:

- Tiny Scanner
- CamScanner
- TurboScan

Records Storage

Keeping notes and records of your sessions with clients is an important aspect of your private practice, hence you employ adequate security measures.

The record storage option you incorporate into your practice is dependent on the law of your state. In Florida, you are required to store paper records behind two locked doors (Check YOUR… Private Practice Planner for your laws).

When using an Electronic storage option, you'll have to protect your records with passwords and encryptions. You can also use EHR software for storing sensitive client data. For this purpose, you can use Theranest via iTherapy.

Theranest and Simple Practice are the top-rated electronic health record storage for the mental health provider. You can check reviews and tutorials of both companies to see which serves you best.

Theranest is more preferred because of their phone tech support. Simple practice on the other hand does not offer this feature but it is a more cost-effective option.

Below are some feature lists to help you decide which storage platform is for you:

Theranest Features https://theranest.com/features/

Theranest Review https://www.tameyourpractice.com/blog/theranest-review/

Simple Practice Features https://www.simplepractice.com/features/client-portal/

Simple Practice Review https://www.tameyourpractice.com/blog/simplepractice-review/

Do you want to check out more?

https://www.tameyourpractice.com/blog/cloud-practice-management-system-table-contents/

Invoicing/Payments

Most all-in-one EHR platforms offer outstanding invoicing/ payment features, but when automating your practice using the piecemeal method, you will have to get a stand-alone system. There are a number of stand-alone billing systems including Square Up and IvyPay.

Overall using all-in-one platforms like Theranest and Simple Practice is more cost-effective than using the stand-alone systems mentioned as they almost cost the same.

Review of Square up & Its HIPPA compliance https://personcenteredtech.com/2016/02/21/square-hipaa-compliant-ethics-hipaa-client-safety-considerations/.

Review of IVY & Its HIPAA compliance

https://personcenteredtech.com/vendorreview/ivy-pay/

Module 7: Marketing, and Networking

Up next is marketing your practice. This is, also, another important aspect of your business. As a business owner, you must promote and push your newly launched business to the right audience and drive traffic to your website. And as you already know, the more traffic to your website, the higher the revenue.

For marketing your practice, you will need to engage in both online and offline marketing strategies. Although bulk of your marketing techniques will be online, especially if you plan to run a virtual therapy. To grow in this approach, you must leverage both online and in-person marketing. We will talk about in-person marketing later in this course.

7.1. Define Your Marketing Objective

Earlier in this course, we talk about the importance and benefits of setting goals and objectives. The first step to having a successful marketing campaign is by clearly defining how you intend to go about the campaign. Also, you need to understand that marketing is not a one-stop thing. It is

continuous, especially now that you are just starting your practice. You need to put yourself out there and let people know and what you do. Knowing this will inform your marketing decision.

Here are a couple of questions that can help you come up with objectives for your marketing campaign:

- What do you intend to achieve with your marketing strategies?
- Will be online or in-person marketing?
- What online platforms do you intend to use?
- What's your budget?

You will need to provide answers to all these questions to get a clear picture of how your marketing strategies.

7.2. Deciding on Your Marketing Strategies

We will talk about in-person marketing later in this course. Let's talk about some strategies to help you grow through online marketing.

Build a Social Media Presence

A very good way to promote your business is by leveraging the power of social media. There are different social media platforms, and they all promote your business effectively in different ways.

Create social media accounts for your business and build and grow your followers on each platform with quality and fresh content. Then, you can run ads on these platforms or pay influencers to market your product.

However, you don't have to do all these at once, as creating and managing social media accounts can be a handful. But if you have a robust budget, you can hire professionals to manage your social media account.

Also, pay attention to your target audience's demography and their most preferred platform. Instagram will be an excellent platform for marketing to a younger audience, Facebook for the older audience, etc. Ensure you have the link to your website on all your social media pages.

The key is building organic relationships with your audience; connect with them genuinely, provide values, answer their questions, and offer solutions. It builds trust and confidence. Remember, people don't buy from you because of what you sell, but because of how you make them feel.

Some of the social media platforms you can leverage on for your practice include the following:

- Facebook
- Twitter
- Instagram
- Pinterest
- Youtube
- Website
- Blog Posts
- Directories
- Linked In
- Google My Business

It's essential to be strategic in reaching your ideal clients on social media. It all boils down to the type of audience you want to pursue. If you wish to follow the mums, Pinterest might be the best platform; if young minds, you can do Instagram. Whichever one you decide to use, make sure to give it your all. Being consistent across all social media might be daunting and time-consuming, so I will share with you my top secret that makes managing my social space EASY!

The best social media platform to utilize, however, is FACEBOOK! Facebook has 2.23 BILLION active monthly users, and it's been proven to be the best social media platform for growing a personal brand. If you wouldn't be using Facebook, make sure to put in twice as much effort in any of the social media platforms you would use.

Choose a Suiting Social Media Platform

Preferably, you should start with two social platforms, and then expand across other platforms as your practice growsa. This is to ensure effectiveness. However, if you are working with a robust bydget, you could hire experts on different social media platforms to help you with the advertising.

Otherwise, for a start, Facebook and Youtube will do. This is just a suggestion, you can always decide to work with other platforms you think you can handle well.

Build Consistecny Across All Your Online Platforms

Everyone on social media has an end goal; some show up for entertainment while others show up consistently for their business growth. If you want to grow in the online space, you should have these at the back of your mind.

- Allow potential clients to verify that you exist and that your presence online is for a good reason.
- Build trust with your followers or networks online. You will get to know if your audience is starting to trust you when they consistently engage in your content.
- Show up consistently with excellent content that will reach your target audience, which can be converted to ideal clients.
- Always have a call to action at the end of your contents.

Firstly, it's honest; we all “google stalk” most professionals and celebrities. If you are looking to grow your brand online as a professional and you want to build trust with your audience, you have to be consistent. Why? Your potential client will search for you; they will always be eager to know more about you. They want to see your credibility, and the only way to show them that you are the best at what you do is through what you do with your social media.

If you would be using Facebook as your main social media focus on building your brand and you shoould set your page on private, your profile picture would remain public. This is why you need a professional display picture. Your display picture is a key part of your branding, as we discussed earlier in the course. You profile picture helps attract your client. Hence, if there are images you think aren't good enough for the public view as a professional, I'd advise you to take them down.

While profile is on private, delete anything, including blog posts, product reviews, and inflammatory conversations on forums/threads you participate in, you think your audience will tag as unprofessional if they see it. Clean all mess, not just on your Facebook page alone, but across all your social media platforms.

Also, ensure you exist across some professional online spaces such as; Facebook, LinkedIn, Twitter, etc. If you can't be very active, show up occasionally so your potential clients can find you. Your Clients might get suspicious if they can't find you online, especially when they are already pushing past the novelty of "online" therapy and the stigma of the treatment itself.

To build trust and to be likable by your potential clients, dish out value across your social media platforms. The more value you give it, the more your audience grows to like and trust you.

Other Platforms you can explore include:

Youtube, REDDIT, HARO.

These social media platforms aren't well dominated by therapists PLUS they have high SEO such as Youtube, REDDIT and HARO. This is because they make use of videos for optimizations and not so many people are good at doing that which might give you a credit if you know how. You'd agree that YOUTUBE is a master at this. I mean, almost everyone runs to youtube to look up anything and everything.

You can build your presence on YOUTUBE by making videos, using PowerPoint and voiceover. To make it more fun, you can make use of cartoon videos to convey your message to your audience. It doesn't have to be fancy. Guess what? You can do all these for FREE.

Reddit

Using Reddit is a great way to build your online presence. This involves making impacts where potential clients can see your accomplishments and recognize your voice.Preferably get in touch with Nicholas Fuller if you'd like to make the best use of Reddit. He has a course on impressive ways to make impacts while building yourself as well. Guess what? It's also FREE!

HARO (Help a Reporter Out):

This is a great way to get "published" or "featured" on various online and physical news sources. Check out Melody Wilding to know more about how to use this best. She has a FREE tutorial video about how to use HARO to build your practice on her site (Melody Wilding.)

If you enjoy writing, you should go for it. She was able to grow her practice online using this, she can help you as well.

You can explore other social media platforms; maybe meet a professional to help you with it. The discussed ones are, however, a good place to start.

Maximize Email Marketing

Email marketing is another way to promote your practice. Your website should come with email marketing features. A good example is mail chimp, with which you can craft and design nice newsletters to send to your subscribers.

The emails will contain information about your practice, promotions, and lots more. This way, you keep them updated about your latest services. Also, you can include a feedback feature.

You don't have to spam your subscribers. You should only send emails when you have new or latest information or are running an annual or promotional sales. Sometimes, send an appreciation mail. Be conversational and make it human. Tell them how much you appreciate them after consulting with you.

Finally, ensure you know and adhere to any regulations in your state or country. Not just the regulations of where you stay only but also that of your customers. It is your responsibility to know which laws apply to them. Examples are the CAN-SPAM Act in the United States, the General Data Protection Regulation (GDPR) in the European Union, and the Canadian Anti-Spam Law (CASL).

7.3. Developing Relevant and Quality Content

The kind of content you upload on your pages across the internet will pretty much inform people what they need to know about you. Before they meet you or weven book a session with you, your post across your website and social media platforms will either push them away or make them become your clients.

Quality and relevant content, including copies, vieso, pictures, etc, is one of the most important parts to building your online therapy practice. This is because your potential clients will get to know you through your content. Your content's impression will draw them to you, and you know what they say about first impressions, right?

If you've ever looked for your own therapist using a directory, you must be aware of how frustrating it is when every therapist says the exact same thing and lists every specialty as their specialty. It's so frustrating.

Below are a few tips to develop quality content:

- If you want to land great clients, you have to show them what you are good at. Build trust with your potential clients to make them paying clients. Talk about how your practice can help them. Talk about things that make your practice unique. This will make you stand out from all other therapists saying the same mundane thing. That alone will get you more calls. Yes, it might turn away a few folks who think you aren't good at what you do. That's OKAY!
- They are also likely to choose you based on your personality and how you talk about your work, and less on the pain points before and after therapy. Focus more on showing yourself, values, ideals, vision, etc, very clearly in your writing, the significant impact on therapy in their lives, and how you do the work (in normal people language).
- Use ordinary people's language. Take note! Avoid using these words, especially in the first few paragraphs: eclectic, integrative, person-centered, psychodynamic, psychoanalytic. Your client's might not know what these things are. A few clients are getting wise to the term "CBT," but you can include anything theoretical (for those looking for that) toward the end.

- Tip 3: Think of your favorite clients. How would they describe their feelings before they came into therapy? Those are your first two lines of your directory profile. Think of how they would describe how they want to feel by the end of therapy? This will be the next couple of lines of your content. Think of what you do to get them from point A to point B, in normal people's language. Those are the next few lines. Is this clear enough?

- Online therapy is not your niche. At this point, very few clients will come to you specifically because you do online therapy. They will be drawn to your niche. Focus on your niche. Include that your therapy is online somewhere in the first paragraph but as a

"bonus" not the main dish. You can't break this to them like this; “We get to do all this work in the comfort of your own home via secure video psychotherapy.”

- If you are targeting high-functioning clients with a pretty typical phase of life issues or folks interested in insight-oriented therapy. A few things to remember: Since they are not in pain, they clearly understand the significance of therapy to spend their money on it. Speak to them about the impact great therapy has on a high-functioning person.

7.4. Connecting With Professionals in the Industry

Directories

Directories are more of platforms to connect with othe rprofessionals, and food clients to find you than marketing. In fact, there are only two directories that ae commonly uses; **Psychology Today** and, depending on where you live, **Good Therapy.**

These two directories are important for you as private practice owner. Hence, your profile has to be impressive and great because this is where many of your clients will find you.Put some thoughts into creating the profile. Creating the profile is free.

Creating a Profile On Pyschology Today

Below are a few tips to help you create a wonderful profile:

- Ensure you have great bio that highlights your values, visions, niche, mode of practice and every other important detail.
- Your profile picture matters a lot. It is very essential to branding yourself. Your picture has to speak confidence and exude professionalism. This will organically attract your potential clients. Go to a studio and take professional headshot.
- Always review your profile. Correct grammatical errors, language structure, or anything that will keep your profile recent may get you a few calls in a week. This is because changed directories get more hits than stale ones. The change you make doesn't have to be significant at once; continuous review will make it effective as time goes on.
- “Psychology Today” gives you opportunity to add two zip codes to your profile; one for your personal address. Choose the second zip code thoughtfully. Preferably, you can

google which zip codes in your state have the highest income per capita if you are looking for people with high gains to pay your fees.

- Aslo, youc can add two addresses with an extra zip code per address. That's four zip codes in total.
- Always state your rates in your profile. This is very important to prevent getting unyielding calls.
- **BONUS.** Instead of listing yourself on different directories, spend your time and energy, building connections, great content, and a well-structured website. These are exactly what will drive your ideal clients.

Finally, remember, professionalism, authenticity, and credibility are very essential to your success as a therapist. Ensure your presence across the internet speaks what values. Do a proper clean up of your online footprint. This is because your prospects will want to know abou you, and you don't want them coming acorss things that don't allign with your values.

You can check out Laura Long's free course on creating a compelling profile. Here is the link to the course: Laura's Course
Also, Tamara Howell offers free short courses on how to create an amazing Psychology Today Profile. Tamara's Course.

Workbook

/Link/

Module 8. Launching Your Practice

You made it this far, congratulations! We have set the foundations and put necessary things in place. The legal work is in place, and your marketing strategies are defined and ready to fly. You are intentional about your practice, and it's time to launch your practice.
However, there are just a few stops to make before you book your first therapy session.

8.1. Develop Your Client Screening Process

A very crucial aspect of your private practice is quality stream of incoming and interested patients. It's usual for you to want to get your calendar filled by taking on any patients at the beginning of your career. As a new therapist just setting out, financial pressure, high aspirations to meet your target and even pay off some bills can be very dauntiing. Sometimes, the easier way out is to compromise on your screening process.

However, not only is this unhealthy for your practice, it can get you in troubles pretty quickly. This in you need to put some protocols and principles in place to ensure effective screening process. In fact, every successful practice has effective screening process for their prospects. Hence, the sooner you build this into your practice, the more effective your workflow.

Moreso, your screening process is your first interactions with your clients, and, usually, this is the most important. This is because, it offers an opportunity for you to learn more about why your client is seeking support, develop relationship, form a case conceptualization and foundation for treatment, and get an idea of their goals for therapy.

However, you first meeting with your clients is not enough to know everything abou them, and you don't have to discuss elaborately about your clients' needs during the screening process. It's simply just a time to meet them, get a glimpse of why they need therapy, and then prepare for future sessions. From preparing for the intake to wrapping it up, we've gathered a few helpful tips.

Ethical and Legal Obligations Before the First Appointment

Earlier, we talked about policies and procedures, and there we talked about some important documents that must be included in your policy and procedure manual. One of the documents is your Informed Consent document. Before meeting with your clients, ensure this is ready and in place. This is because your client must sign this document before you do anything at all. Then, during the first sessions, talk to them about confidentiality. You need toame them understand there are limitations to secrets you can keep to yourself. Although conversation in therapy are private and must remain so, there are limitations to confidentiality. These limitations vary with states, so make findings and know what's applicable.

For example, if a client indicates they are a risk to themselves or others, certain states require you to inform the appropriate authorities. Stay up to date on your state's duty to warn requirements.

Setting Parameters for the Screening Call

If you're not careful, you will not end wasting a whole day screening a particular patient. Hence, you need to put up some paremeters to ensure seamless flow clients.

Usually, screening calls with prospects should not be lengthy. You are basically just gathering information to prepare for future sessions, and not to start a session immediately.

Although some screening calls can be lengthy, depending on what the prospect needs, screening call is just a time for both practitioner and patient to decide if they should move forward and book the appointment. Most people appreciate the fact that you want to do what is best for them from the start.

You can let the patients know from onset the duration they have for the call. Again, if circumstances warrant it, you can stay longer on the screening call. After all, your clients wellbeing should be your priority.

Common Information to Gather during a Screening Call

The type of questions you will ask during the screening process will vary depending on the patients, and preceeding circumstances.

However, most patients reach out for therapy when they are dealing with grief, anxiety, relational issues, etc. The treatment focus may change after the first sessions, this is usually the case. As such, you should questions on what the current primary concern is. Once you gather that information, you can decide if we are equipped and interested in treating this focus.

While your screening a potential clients, ensure you have answers to the following questions:

- ❖ Am I interested and capable of treating this presenting concern?

Here, you have to be honest with yourself. Your reputation comes first. In fact, your reputation is more important than money. A very quick way to soil your reputation is taking on cases you can't effectively treat. Patients will come to you with different mental related issues, it's your duty to screen out the ones you can't handle, or refer them to where they can get help.

Potential patients may not be aware of the difference between an outpatient provider, intensive outpatient program, or a partial inpatient facility.

Understanding fully what clients are really looking for and the level of distress they are in can assist you in determining if your level of care is appropriate for the client. Doing this helps your

potential clients get the help they need and saves you from any liability issues from taking on patients who need a higher level of care than we can give.

- ❖ Does the client's financial situation mesh with your payment and insurance processes?

Potential patients will come to you with different health challenges, and, of course, mode of payment. And as well, they come with varying beliefs of what therapeutic support will be useful. Moreso, asking what clients are looking for immediately sets the stage for good therapeutic rapport, as it shows that you see them as important players in designing their treatment.

- ❖ Will you be available to take on this client?

You don't want take clients that you won't be available for. Scheduling can be easily overlooked when collecting clinical data. This is very important. Ensure your schedule will leave time for you to attend to that patient

Some patients will have their preferred times; they may only be available at certain hours or days due to their work or family obligations, but both sides can usually quickly find out what times work for both. You just need to ask the question!

Ending Your Time and Setting Up for Future Sessions

Now, after you've gathered initial background on your client and discussed potential therapy goals, it's time to wrap up the conversation. Spend the last 5-15 minutes discussing your initial case conceptualization thoughts, reiterating goals, positively reinforcing their decision to seek therapy and next steps, such as scheduling another appointment and homework for the client.

You are not going to provide full therapy at the first session. Let them know effective therapy will take place over several sessions. And that you will continue to address their needs during the next visit.

No two patients are the same. Every patient presents with unique needs. It's okay to have a question checklist, but be flexible. Attend to each client uniquely and differently. Make the conversation natural and relaxing. You may just need to ask one question and dwell on it throughout the screening process. Some questions can be extended to the next visit.

Below is template of what your screening process should look like:

- ❖ The Introduction: Establish rapport and make a connection with your client.
- ❖ The Opening: Ask questions and elicit information from the client.

- The Body: Dive deeper into the clients' needs and establish a structure for progress through intervention and goal-setting.
- The Closing: Wrap up the session by summarizing the interview, providing initial case formulation, positively reinforcing their decision to seek professional services, and explaining how the second visit will look.
- The Termination: End the interview and set boundaries for the client/therapist relationship moving forward.

8.2. Arranging Clinical Scripts

A necessary skill you must have is the ability to communicate effectively. You should be able to speak to your clients in a convincing tone that will get them to listen and feel comfortable sharing the information you require. One popular and effective method is to make them understand that the purpose of the questions you ask them is so that you can help them when they need it.

As you enter the meeting with the client, you should be prepared to gather some important information. It would be best if you also had a comprehensive plan in place so that your session with the client goes smoothly and leads to smoother subsequent sessions.

Things to keep an eye out for are:

- Learn about the client's current location.
- Make certain that there is no technological failure.
- Develop technology backup plans.
- Make emergency response plans.
- Perform a privacy check.
- Create the framework.

Learn About Your Clients and Their Situation

It is critical that the clients complete the necessary paperwork prior to the first appointment. Even after they have filed their paperwork, you should verbally persuade them to provide you with their current address. Naturally, since this is the first session, you will have a lot of questions for them.

Most importantly, you should do everything in your power to make them feel at ease and relaxed. This could include assuring them that future sessions will not be as overwhelming as the first and that they will not be doing as much talking as in the first. Your attitude, body language, and tone should all be accommodating.

As the session progresses, your primary goal is to learn as much as possible about their strengths, their suffering, where they come from, and how you can help them suffer less and experience more joy. Furthermore, you must emphasize the importance of having their contact information on hand at all times.

Ensure There is No Technological Failure.

When there are no other programs competing for internet bandwidth, your signal will be the best. You might as well request that the clients close all other programs. It's especially important to "quit" programs like Skype rather than simply "x" out of them. Also, if they use public Wi-Fi, there may be some technical difficulties. As a result, they are advised to connect to a personal Wi-Fi network if possible. When they run multiple programs that use the same internet connection, the internet becomes clogged, and transmission becomes slow.

While at that, it is important that you don't sound naggy. You should know when to let things be, especially when you feel they have done a lot to make things work from their ends.

Always Have Backup Plans.

Even if the connection is perfect, things may go wrong later in the session. It is critical that you have some backup plans. So, at the start of the session, you might ask for permission to contact the client via phone call in case the connection fails.

Although this appears to be a reliable solution, it does have some drawbacks. If you are billing insurance or submitting a Superbill and have to move a session to the phone, this can affect how you code it and how much reimbursement you receive. It is sometimes preferable to reschedule rather than make a phone call.

The issue is not always related to the internet connection; you may also experience technical failures such as sound, camera, and so on. To avoid such occurrences, you can choose to practice

with your tech prior meeting with clients. You could make an appointment with another member of the group and try everything out.

Also, if you use a VOIP phone number for clients, keep in mind that it is dependent on the internet. If your internet goes down, preventing you from participating in a video session, your phone will also go down.

Make Emergency Response Plans.

These Include;

- **Confidentiality**:

You could begin by reading out the agreement signed by the clients. This will include explaining that anything discussed during the sessions will be strictly confidential. And make the client understand that even when you consult with colleagues about cases involving clients, you always do so in a de-identified manner. So the only time you would ever provide your identity or any clinical information about the client would be with the client's written permission.

Make the client understand that your job is to keep them safe. Tell them that if you have reason to believe that you are in danger of killing or severely injuring yourself or someone else, you will do everything in your power to keep you or that other person safe. And that can include involving others who can assist in resolving the problem, whether they are the client's listed emergency contacts, the police, a hospital, or anyone else.

However, you should clarify to them that this is their job. To avoid scaring them, you should be polite and cheerful. The purpose of saying that is to ensure that you will not be involved in any legal battles that will taint your image.

- **Safety**:

You can continue the session by explaining to the client that the meta-message in all of this is about safety, and you want to take that a step further by ensuring you both have a very specific plan for the client's own safety.

You can consult the paperwork by inquiring about the client's relationship with the people they designated as emergency contacts. In some cases, it is best to explain to them that you almost never need to use emergency contacts, but you will tell them about situations where you might.

Make it clear to the client that your job description includes the client's safety. In the event of an unexpected emergency, you may contact relevant bodies and the client's emergency contacts to

inform them of the situation. It is critical to obtain verbal consent from the client while explaining that cheerfully and jokingly.

They don't always have questions, but you can start by asking if they have any questions about what you've talked about so far. Following that, you should document that you discussed the client's confidentiality limits with them. You should also record the names and phone numbers of their emergency contacts and the nature of their relationship.

It is also critical that you provide them with some national emergency numbers and other nearby resources that you believe they will require in an emergency situation. You should look up the involuntary hospitalization process in their city/county to ensure you have downloaded any necessary paperwork and understand the process. This information can be saved in your policy and procedure manual for each client so that you are not scrambling around if something goes wrong!

A "mobile response team" is something that some areas have. These teams will physically go to the client's home to assess them and, if necessary, transport them to the hospital. It will make things so much easier if one of those is nearby!

You should remember that if you are ever facilitating a hospitalization for a client, you should try to get all of the relevant releases signed before they go to the hospital. You are permitted to breach confidentiality in order to save someone's life, but once they arrive at the hospital, they are safe. In most states, you no longer have the right to speak with hospital personnel or emergency contacts.

- **Privacy:**

It is critical that you convey to the client during the intake session that you value their privacy. You could even go so far as to reveal to them how secure your software is. You can inform them that from your end, there will be no breach of privacy, and it is their responsibility to secure what is discussed during the sessions.

You can advise them to set up password protection on their phone and computer to ensure that any emails, texts, or other communications are secure before they even reach the device. You can also assist them in making an assessment to see if there are any loose ends that need to be tied down so that what is being discussed stays between you two.

- **Create the Framework.**

Working online has both advantages and disadvantages. Working online makes people feel more at ease in their own environment, leading to greater vulnerability, sharing, and even faster results, which benefits both parties. However, one disadvantage is that it is easy to become overly comfortable at home, perhaps to the point where it interferes with the quality of our work. So, you should be able to explain to clients that online therapy has the same expectations as in-person therapy - Arrive on time and be ready to work. They should remove any distractions.
Please bring water and tissues, but no food or alcoholic beverages. Everyone has what works for them because everyone is built differently. Be open to discussing what works for them and their thoughts on what will help you two establish a solid framework.

8.3. Assessing Active Communication.

Ensuring your communication reflects your training and our therapeutic model is an effective way to gather information. According to popular belief, the more comprehensive, the better.
The common norm for doctors is to try to understand every detail possible, but this is not the reality of the profession. Patients often omit vital information that would have influenced how the doctor treated them. So, to avoid the doctor-patient scenario, ask them ALL THE QUESTIONS you can think of so you don't miss anything that would have changed my approach to helping them.
Clients know themselves better, or at least the majority of them do, so you should be an expert at extracting what you need to know to determine the best course of treatment. It is important to note that this formula may not work for you, so you should create your own. However, most people begin the sessions with demographic questions and answers. This allows you to complete your clinical file.
The essential information you should be aiming at obtaining include:

- Full name
- age
- birthdate
- address
- phone number
- email address

- emergency contact 1 emergency contact 2
- ethnicity
- race
- religion
- gender identity
- sex identity etc

Now, there you have it! You're ready to launch your private practice! Ready to storm the world. Although information contained in this course may vary depending on your location and niche, it will provide you with a solid foundation to build your practice on. Moreso, happenings in the real world may present certain requirements that are not discussed in this course, you can always reach out to other professionals in the industry for help. You can also join platforms, and groups that will improve your growth. Remember, two heads are better than one.
Also, I will be here to attend to your needs, walk you through the process of setting up your practice, and provide help to any problem you may encounter in your practice.

Good luck!!!!