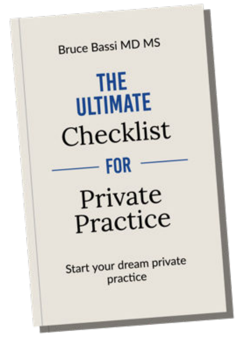
PRIVATE PRACTICE
BRUCE BASSI MD MS
EDUCATION



The TelepsychHealth Private Practice Roadmap

So you want to start a private practice? It will take some time to set up the business and start getting paid, but once it starts working well for you, it is well worth it!

Make sure you have these items checked off to open the business.

Week 1	Business lawyer, choose structure, name, RA, graphic designer, email, phone, address, licensure.
Week 2	Website template, EIN, NPI, CAQH, GMB, submit paneling, professional portrait
Week 3	Website, demo EHR, expand professional network
Week 4	Obtain business bank account, bookkeeper, malpractice, consent forms
Week 5	EHR setup – ePrescribe, schedule, claims
Week 6	Payroll, website, networking
Week 7	Billing service, business compliance dates (quaterly taxes, annual report, annual meeting, supervision notes)
Week 8	Build SEO, networking, run through first day checklist, see patients

Business Structure Checklist

- ☐ Determine your business structure with the help of a lawyer
- ☐ Select a legal name and "doing business as" or fictitious name
- ☐ File your articles of organization / incorporation with the secretary of state. It may be easiest to do this through a registered agent as most of them will also file this for you.
- ☐ Set up a mailing address (if virtual) or start looking for rental space. Some registered agents will also do add-on mail service.
- ☐ If in person, obtain certificate of use (zoning certificate), fire marshall permit, and liability insurance.
- ☐ Obtaining a Tax ID (EIN) – save the SS4 form that you get from the IRS
- ☐ Determine your NAICS code.
- ☐ Keep track of all codes, logins, date of incorporation, due dates, etc.
- ☐ If you're an S-corp and will have payroll, you'll need to create a state withholding and unemployment account with your state's dept of revenue

Financial Checklist

- ☐ Obtain a bank account, obtain checks, and credit card
- ☐ Open a payroll service to pay yourself – this will save you a lot of money as an S-corp.
- ☐ Register for a group NPI number
- ☐ Find a bookkeeper and accountant – ask if you need to submit quarterly estimated taxes
- ☐ Register for a clearinghouse to submit claims
- ☐ Consider a billing service or revenue cycle management service

Bare Expenses	Month 1
File articles	$150
Registered agent	$30
Business address	$25
Business bank account	($300)
Bookkeeping	$89
Payroll	$30
Email (Google Workspace)	$15
Secure Email	($250)
Phone & Fax	$20
EHR (ChARM) + Telehealth	$20
Billing Clearinghouse	$100

Advising	Month 1
Lawyer	$300/hr
Accountant	$200/hr
Course or Coach	$300

Marketing Expenses	Month 1
Professional graphics	$100 - $1000
Web developer	$100 - $1000
Web hosting for the year	$300
PsychologyToday	$29

BAA Checklist

- ☐ Choose an EHR system
- ☐ Choose an email system
- ☐ Obtain a phone, fax system
- ☐ Form System

Insurance Checklist

- ☐ Obtain malpractice insurance
- ☐ Obtain employment practice liability insurance
- ☐ Obtain liability insurance
- ☐ Obtain workers compensation
- ☐ Obtain disability insurance
- ☐ Create CAQH, apply to insurance companies if you want to be in network

Policies Checklist

- ☐ Develop consent forms
- ☐ Develop intake form
- ☐ Develop internal clinic policies and procedures
- ☐ Test forms systems

Marketing Checklist

- ☐ Develop a logo
- ☐ Create a website

Workflow Checklist

- ☐ Set up your schedule, calendar
- ☐ Reputation management
- ☐ EHR customizations

Review your First Day Checklist

- Business entity
  - ☐ In good standing with the secretary of state
  - ☐ BAA in place with third parties
  - ☐ Reviewed state statutes
- EHR
  - ☐ Test patient reminders
  - ☐ Telehealth enabled
  - ☐ Quicktext, ePrescribing, other features enabled
- Insurances are active
  - ☐ Malpractice insurance
  - ☐ Liability insurance
  - ☐ Workers comp

- ☐ COU in place
- Telehealth checklist
  - ☐ Using a HIPAA compliant telehealth platform
  - ☐ Have signed BAA in place
  - ☐ Complete any telehealth attestation needed for your payer
  - ☐ Be in compliance with all applicable laws, rules, regulations and state board requirements applicable to the delivery of Telemental Health, prescribing, coding requirements, and documented protocols (e.g., informed consent, emergency contact information).
  - ☐ Soundproof room to protect patient's privacy
  - ☐ Secure wifi connection, or using secure VPN
  - ☐ Contingency in place for backup platform
  - ☐ Have your business phone readily available to call patient if there are issues
  - ☐ Licensed in the state where the patient is located
- Initial Appointments Discussion
  - ☐ Welcome them to the practice and thank them for completing the intake forms.
  - ☐ Confirm the patient's location is the same as in the chart.
  - ☐ Confirm the patient has a comfortable and private location.
  - ☐ Invite them to take a break if necessary to get water, etc.
  - ☐ Inquire about pronouns and nickname, if applicable.
  - ☐ Ask the patient to create a ChARM account if they have not done so, and remind them that this is how we typically communicate with patients.
  - ☐ Mention you will be taking notes throughout the session, and you also encourage the patient to take notes and write down questions for the next session.
  - ☐ If you're a prescriber, remind them to always reach out to us directly for medication refills and don't rely on the pharmacy, even if the pharmacy says they will contact us.
  - ☐ Always create a follow up appointment before ending the session - do not rely on the patient to create one.
  - ☐ Ask if you have addressed all of their concerns and if they completely understand the treatment plan.

Affiliate Links

These are systems that I use, that I can guide you on, and that I receive a very small commission if you use.

ChARM Health EHR System - sign up for a free account
https://ehr2.charmtracker.com/ehr/ehrSignup.sas?referer=Referred-by-Dr.Bruce-Bassi

Lindy.ai AI note writing scribe - get 50% off your first month
http://www.lindy.ai/bruce

Psychology Today for 2 months free
https://join.psychologytoday.com/us/signup?referrer=909675780001&utm_source=TDE&utm_medium=Email&utm_campaign=TD_INI_1_1_A9

Paubox for $250 off
https://www.paubox.com/referral/?tracking_id=790058a5aabb9320897212343

Constant Contact HIPAA email marketing, for 30% discount for the first three months:
https://www.constantcontact.com/signup?pn=telepsychhealth

Jotform Form System
https://link.jotform.com/telepsychhealth-SktqjndKxz

8×8 Phone System
https://share-referral.8x8.com/mzrTnsn

Descript Video Editing
https://www.descript.com/?lmref=PKIRKg

Riverside Video Recording Studio - Record in Full Resolution
https://riverside.fm/?utm_campaign=campaign_1&utm_medium=affiliate&utm_source=rewardful&via=bruce-bassi

<u>New Hire Checklist</u> – keep in employee file

- ☐ Employment agreement
- ☐ Background check
  - Education check?
  - Employer check?
  - We use ClearChecks for background checks – makes it very easy – just enter their email and they do the rest. Results come back in about 1-2 days.
- ☐ Reference check of at least 1 supervisor
- ☐ Signed clinic policies that they received the following:
  - Workplace Discrimination Policy
  - Sexual Harassment Policy
  - Equal Opportunity Employment Policy
  - Medical Leave (FMLA policy)
  - Disabled Employees and Accomodation Policy
  - Non-retaliation policy
  - Reporting, Investigating and Resolving Employee Complaints Policy
  - Written Performance Appraisals/Reviews Policy
  - Discharge / Termination Policy
- ☐ Checking a recent documentation example for a patient
- ☐ HIPAA Training
- ☐ Cultural Competence Training
- ☐ Sexual Harassment Training
- ☐ State SIT and SUI
- ☐ Workers compensation
- ☐ State department of revenue reporting for child support if applicable
- ☐ Payroll enrollment, direct deposit, I-9 and W-4
- ☐ Enter healthcare deductions into payroll system
- ☐ Orientation: email, ehr, calendar system
- ☐ Emergency contact
- ☐ Enter their information into your employee spreadsheet
- ☐ Supervisory agreement (for clinicians if applicable)
- ☐ Job description
- ☐ Schedule 90 day review with employee

How do you develop a private practice logo?

Define the brand's identity, mission, and values before starting the logo design process. This will help guide the design and ensure that the final product accurately represents the brand. Research the industry and competitors to identify common design elements and ensure that the logo is unique and stands out. Consider the intended use and mediums for the logo, such as business cards, websites, or signage, and choose a design that is versatile and can be easily reproduced in various sizes and formats. Work with a professional graphic designer or branding agency to develop the logo. They can bring expertise and creativity to the process, and can ensure that the design is visually appealing and meets industry standards. Test the logo with target audiences and gather feedback to make any necessary revisions. Once a final design is chosen, use the logo consistently across all branding materials to establish brand recognition and credibility.

What is a BAA?

A Business Associate Agreement (BAA) is a legally binding contract between a covered entity (such as a healthcare provider) and a business associate (such as a data storage company). The purpose of a BAA is to ensure that the business associate will appropriately protect and handle any protected health information (PHI) that they may access or process in the course of providing services to the covered entity.

Avoiding Burnout.

It's important to set boundaries and establish a work-life balance to prevent burnout. This could include setting specific working hours and making time for self-care activities like exercise, hobbies, and spending time with loved ones. Delegating tasks and responsibilities to employees or outsourcing certain functions can help alleviate stress and reduce workload for the small business owner. Regularly taking breaks and practicing mindfulness techniques, such as meditation or deep breathing, can help improve focus and reduce stress levels. Seeking support from a mentor, business coach, or support group can provide valuable perspective, new ideas, and a sense of community for the small business owner, helping to prevent feelings of isolation and burnout.

How do you find a mentor?

One way to find a private practice mentor is to reach out to professional organizations and associations within your field, as they may have mentor matching programs or can connect you with experienced practitioners. Networking with colleagues and attending conferences or events in your industry can also provide opportunities to meet and connect with potential mentors who can offer guidance and support in your private practice.