ORGANIZATIONAL STRUCTURING

Think about the following questions to figure out what systems to put into place. You can always adjust and add to this later. Remember, depending on if you have employees or independent contractors, your expectations will be different. Consult with an attorney to make sure you are treating your staff as you should depending on your set-up.

INTAKE

- [ ] Who is doing the intake calls/scheduling? If someone else is doing them, how are they keeping track of schedules?

- [ ] How is the client getting intake paperwork (emailed, online, in office)?

- [ ] If using insurance, who is doing benefit checks and how will you let the client know?

NEW HIRES

- [ ] What is your hiring process? Who are you looking for? Certain specialties? Specific days to work? How many hours? IC or employee? How is your pay structured?

- [ ] What information do you need from new hires? W2, W4, 1099 form, copy of license, malpractice insurance, resume, signed contract, diplomas, etc.

- [ ] Do they need to apply for insurance panels, and if so, which ones?

- [ ] Do you offer supervision for your staff?

OFFICE POLICIES

- [ ] Opening/closing of office. Do you want overhead lights or lamps on? Music turned on? Anything they need to know if they are the first to come to office or last to leave?

- [ ] How will you be doing payroll? Do it yourself or hire someone to do it? * I use Intuit Full Service Payroll and do it myself, easy peasy :)

- [ ] If you have employees, do you expect them to market themselves? Having a plan for discussing this is important. Can they blog for your business page or get paid to market themselves? Do you have/want incentives?

- [ ] Will you offer retirement accounts or health insurance?

- [ ] Is your system secure? HIPAA compliant? I have TherapyNotes for EHR, Google Apps for Work and Virtru for secure emails. Do you offer email accounts for your employees (NOT FOR IC)? What about phone extensions (not required, but useful depending on the structure of your practice).

- [ ] Do you have no show/late cancel fees? What about a credit card on file to reduce high balances?