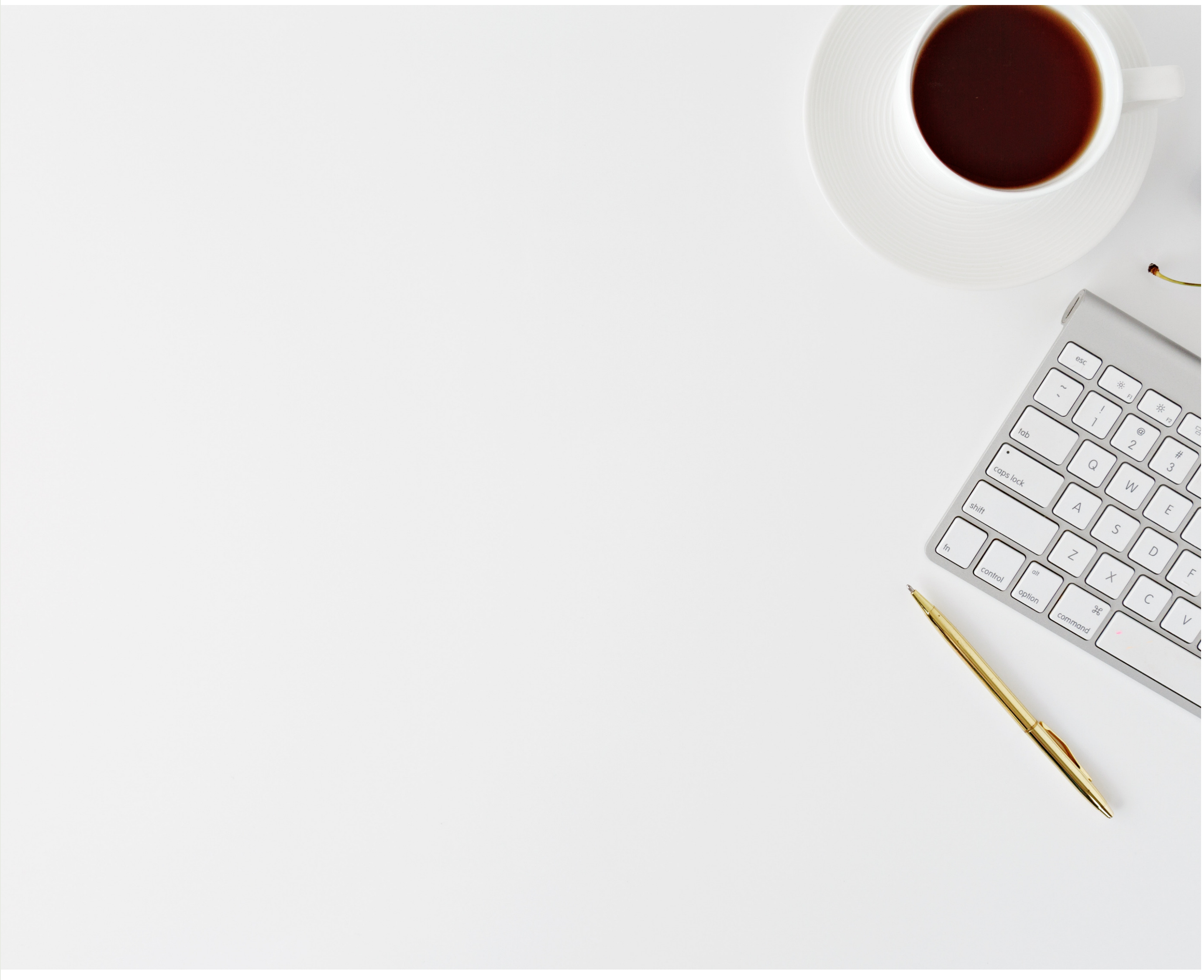
# THE MOST COMPREHENSIVE TASKY CHECKLIST FOR STARTING A GROUP PRACTICE



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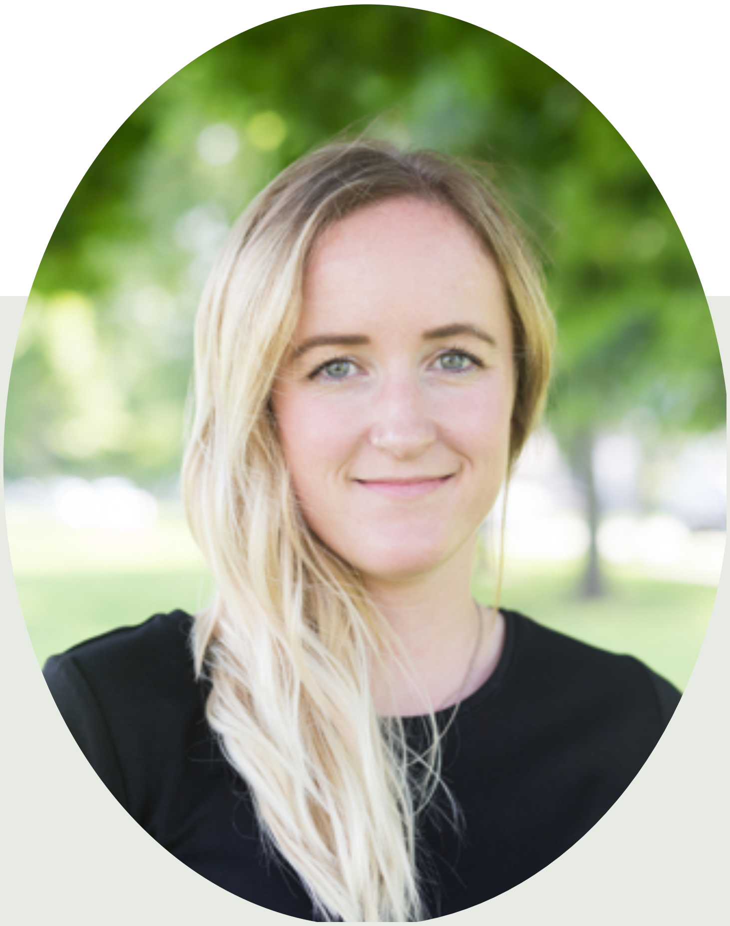
Group practices can vary in setup in as many ways are there are stars in the night sky. Group practice owners often find it hard to figure out exactly what they should be doing first and even fear not knowing the questions to ask that they don't yet know to ask! This tasky checklist is meant to help you think through all aspects of starting a group practice so that you are prepared. It is organized in a way that helps you start with the most important tasks and works your way down to tasks that are important later on in your group practice building journey. Do one task at a time. Ask for help from others. And don't compare your self/group with others. This is a journey that has no expected growth rate. Take your time, you will get there.

*Maureen*



# BEFORE HIRING YOUR FIRST THERAPIST

- [ ] Decide on a group practice name. Do you need a name change? If you have your solo practice name as your name, do you want to continue that on to your group practice? Do you want your name to be your group practice brand? Think this through, it's a pain in the butt to change later.

- [ ] Set yourself up legally as an entity with your state and IRS (LLC, PLLC, S-Corp, etc.). Get help from a business attorney. It's a small fee compared to misfiling your group practice. They also help you decide on the best structure for your group practice based on your intended growth.

- [ ] Write a Business Plan.*

- [ ] Figure out your group practice location. Will you buy, rent, stay in your existing space, expand?

- [ ] Build your mission statement, values, and vision for your group practice. This helps potential clients connect as well as help potential clinicians know if they are a good fit.

- [ ] What is your group practice brand? Think colors, décor, logo, office design + feel. You want consistency and for your community to easily recognize your group practice. Inconsistent branding is an obstacle to growth.

- [ ] Get renters insurance, if you don't already have it.

- [ ] Get an NPI-2 for your group practice, whether you plan to take insurance or not.

- [ ] Find an accountant to do at least quarterly profit and loss and balance sheets (preferably monthly). Do not skimp in this area. The biggest complaint group practice owners have financially is owing more in taxes than they expected.

- [ ] Find an employment attorney. You will be using them not only for building contracts, job descriptions, and offer letters, but also to ask employment-related questions to throughout your business ownership tenure. This employment attorney will also help you process a decision on whether you will hire employees or contractors, as well as make sure that you treat them as such.

- [ ] Find an attorney to process legal issues for malpractice/private practice/ethical issues. Many will offer a free 15-minute consult with your therapists, so you don't need to be a point of contact for each question.

- [ ] Update your malpractice insurance when you become a group. Figure out if you will need to pay for your staff's malpractice insurance (you will need to pay if you have employees, you will likely not need to pay if they are contractors). Your malpractice insurance will also discuss if it is important to have contractors listed on your malpractice insurance.

- [ ] Update things (or build them), like paperwork, business cards, logos, website.

- [ ] Make sure your group practice is HIPPA compliant. Think technology like phones, texting, storing documents, EHR, faxing, communicating PHI inside and outside your office, email, etc.

- [ ] What kind of support do you need now? Group practice owners often delegate answering phones and billing first.

- [ ] Come up with a formal no show late cancel policy that all your staff will follow. This goes for all other policies you currently have in place if you are a solo practitioner.

- [ ] Come up with a marketing strategy, one for yourself as a group practice owner and one for your staff. I call it the two-pronged approach.

- [ ] Find a payroll company. I use Gusto and love it.

- [ ] Find an EHR that supports group practices and your needs. I use TherapyNotes and it works amazingly well for group practices. Also, if you ever plan to hire someone to do medication management, it has psychiatric capabilities. Use the link for 2 free months.

- [ ] Figure out your rates as a group practice and if you will accept insurance as a group. If you will, check with each insurance plan to see if they have group contracts and what the easiest way to panel clinicians is for that particular insurance. Start collecting links for applications for your future staff (more on that a few pages down).

- [ ] Decide if you are hiring employees or contractors. Use this handy sheet to help. Be sure to use an attorney to finalize this.

- [ ] Will you be a multi-specialty or niched group?

- [ ] Will you be a multi-disciplinary or single discipline group (LCSW, LCPC, PhD, NP, acupuncture, etc.)?

- [ ] What services will be offered? Hint: your business plan will have helped decide this. Think 1:1 counseling, groups, workshops, speaking engagements, e-courses, webinars, teletherapy, etc.

- [ ] What phone system do you want to use? What do you need it to do for your group practice? I use All Call Technologies for years now and they are great, HIPAA compliant, and are super customizable. Mention TGPE for $50 off setup.

- [ ] Decide on pay structures for clinicians, admin and yourself. Use an employment attorney for this, as they will tell you what pay structures work in your locale. Each state, county, area may have their own laws around pay structures (i.e. flat rate, salary, commission based, paying biweekly or monthly, paying for admin work separate from clinical work, etc.).

- [ ] Figure out your total operating expenses. If you are a solo practitioner, you have a good amount of it already on hand. Write it down. This helps you stay within your budget and know what your clinicians' income should cover.

- [ ] Add your clinician's costs in a separate line item. How much will each therapist cost you? This is important. Think malpractice insurance, EHR, phone extension, email account, marketing, and any other cost associated specifically with each therapist. This will help you make sure that you hire clinicians who work a minimum number of hours that will cover your cost of having them. If they are contractors, this cost will be close to $0 since they should cover their own expenses.

- [ ] Another great thing to know is how should each room in your office bring you revenue-wise. Let's say a room that is well used is seeing 8 clients per day. That may be two clinicians working four-hour increments or one person working 9 or 10 hours (remember, cancellations). When you know how many sessions an office should realistically bring you, you can get a rough estimate of how much revenue that room should bring you. It then aids in hiring clinicians who can work those hours.

- [ ] Manuals
    - [ ] Employee manual (for employees only) *
        - [ ] Workplace policies*
    - [ ] Operations manual (for employees, limited for contractors) *
        - [ ] Office procedures*

- [ ] Will your office offer/require supervision/consultation for your employees? If so, what are the terms?

- [ ] What is the client journey, from the first call through termination? Draw out your group practice's client journey. This helps make sure that your clinicians and admin (or just clinicians if they are doing some of the admin work) know the process and organization of tasks. *

# RECRUITING, HIRING, ONBOARDING

- [ ] Who is your ideal clinician? Use this worksheet to help you.
- [ ] Do you want provisionally licensed therapists or interns? Often, most of your applications will come from provisionally licensed therapists. Be sure to know ahead of time if that is what you want, if it is what the community needs, and if you have the time and resources to support a provisionally licensed therapist.
- [ ] Find workers comp if you decide on employees. Your payroll company may have that bundled in with their service.
- [ ] Figure out your recruiting and interviewing process. Where will you look for your prospective therapists? What questions will you ask during the interview process? Be sure to set up several points of contact with your prospective therapist before hiring them (i.e. don't just interview them once and that is it).
- [ ] Will you have formal evaluations (for employees)? *
- [ ] Will you offer incentives for your employees (health insurance, retirement matching, sick time/PTO, bonuses, profit sharing, life insurance, short-term disability, CEU stipend, etc.? Make sure to think through your pay structure first and only offer one incentive at a time (that way you can be sure it is financially feasible).

# AFTER HIRING YOUR FIRST THERAPIST

- [ ] Build an onboarding checklist for new therapists that includes a timeline of tasks they need to get done as well as things you need to get done (like adding them to your EHR, completing a bio, getting a professional photo, etc.). *
- [ ] Get each clinician's CAQH number if you are taking insurance. Make sure they update their CAQH to include a fresh malpractice insurance that includes your business, and that they add your business as a current employer. They will also have to update resume to include your business.
- [ ] If you are taking insurance, you will need to complete a W9 for each therapist and each insurance.
- [ ] Complete an I-9 for each new therapist.
- [ ] Obtain a copy of your therapist's license.

- [ ] Have your clinicians apply for an NPI-1.
- [ ] Help your clinicians contract with insurance companies (if you want them to be in network).
- [ ] Help them build a bio that speaks to their ideal client.
- [ ] Get a professional photo of your staff (if you want clinician photos on your website).
- [ ] Set up an onboarding training period to help your new clinician work successfully in your group practice. Think of your operations manual. Creating video trainings are useful, as you only have to do it once and your staff can watch the videos.
- [ ] Add your new clinician to your phone system, EHR, malpractice insurance, website, email system, business cards, etc.
- [ ] Think about how you will support your staff and create a culture of positivity and connection.
- [ ] What is your process for communicating concerns with staff? What is your leadership style?

## NEXT LEVEL

- [ ] If you decide to have support staff, you will need to think about if you will outsource it or hire in house.
    - [ ] If outsourced, you may need to find several VAs who can do the tasks that is needed. Typically, one person can't do it all (phones, social media marketing, SEO, advertising, etc.). Use this worksheet to help you figure out what you need help with.
    - [ ] If in house, you will need to have your employment attorney make a job description, contract or offer letter.
    - [ ] For outsourced or in-house support, you will need to write up an operations manual for their tasks. Start now. Write out scripts for answering the phone and other administrative tasks.
    - [ ] For outsourced VAs, make sure they have a solid contract with you as a 1099 and a BAA signed if they are looking at PHI. *

- [ ] Track your metrics. Things like clinician retention, weekly session averages, average monthly intakes, clinician time off tracker, clinician sick time calculator, average session rates, referrals, etc. are helpful in seeing if your group practice is growing and thriving. *

- [ ] Simplify and streamline any processes in your group practice. As you grow, you will be able to streamline processes to make life easier for your staff and yourself.

- [ ] Supporting rock stars and superstars (read the book Radical Candor). When you provide support to your clinicians and offer growth opportunities, they become invested in your group practice and stay to help you make your group practice a success.

- [ ] Find a financial planner who can help you plan for your future.

- [ ] Get a line of succession plan built with an attorney.

- [ ] What is your process for a Performance Improvement Plan?

- [ ] What is your process for terminating a staff member?

- [ ] How much do you want to work? Organize your time so that you are using your time effectively. I batch my work into categories. Start with figuring out how much you work doing CLINICAL WORK (seeing clients), STAFF MANAGEMENT (hiring, onboarding, training, supervising, etc.) and BUSINESS MANAGEMENT (marketing, payroll, website building, expanding, etc.). Say you want to work 20 hours a week, that would need to be split between clinical work, staff management and business management. Listen to this.

***The Group Practice Exchange Paperwork Packet has templates for these documents.**

# JOIN NOW!!

Join our amazing community of group practice owners starting and scaling their group practices. The Exchange is a membership community that boasts a large library of documents and training videos. Every month several things happen: a training video is uploaded, an interview with an expert in the field is uploaded, someone is chosen for a 1:1 coaching session for all to watch, and four (4) facilitators host monthly LIVE Q+A session for you to get your questions answered. And of course, a private Facebook group. Join us today!
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