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**LEAP AND LAUNCH!**

**HOW TO BUILD YOUR PRIVATE PRACTICE FOR MENTAL HEALTH PROFESSIONALS**

*A Step-by-Step Blueprint for Starting and Growing Your Therapy Practice*

**BY RORY CAROTHERS** *Licensed Professional Counselor*

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# Foreword

When I first entered the world of mental health, I quickly realized that graduate programs train us exceptionally well to be clinicians—but rarely to be business owners. Most of us leave school with a wealth of therapeutic skills but very little understanding of the systems, structures, and strategies needed to launch and sustain a private practice.

I designed this course—and now this e-book—because I wanted to close that gap. I wanted to provide therapists, counselors, and other mental health professionals with a practical, step-by-step blueprint that demystifies the business side of therapy.

Whether you’re just starting out and wondering how to get credentialed with insurance companies, or you’re a seasoned clinician ready to scale your services and hire a team, my goal is to walk with you through every stage of the process.

This book is not just about logistics like EMRs, claims, or marketing strategies—it’s about giving you confidence. Confidence to choose the right entity type, to set your fees without guilt, to network boldly, and to position yourself as the professional you’ve worked so hard to become.

My hope is that as you move through these modules, you’ll feel empowered to take the leap into private practice—or at the very least, develop a much clearer understanding of how the business side of therapy works.

You deserve a practice that not only sustains your livelihood but also supports your purpose. The world needs your unique voice and healing approach. I wrote this with the hope that you’ll gain the clarity, courage, and tools to step forward and build it.

With encouragement,

Rory Carothers, LPC

Creator of Leap & Launch Your Private Practice

**Module 1 — Decide & Design: Your Practice Blueprint**

**🎯 Learning Goals**

By the end of this module, you will:

* Understand the core business entity options for your private practice.
* Know which identifiers (EIN, NPI, CAQH) you need and why.
* Clarify your practice’s scope, niche, and services.
* Begin drafting a vision for the practice you want to build.

**📖 Teaching Content**

**1. Choosing Your Entity Type**

Your first step is to decide the legal and tax structure of your practice. The most common options are:

* **Sole Proprietorship** – Simplest to set up, but you and the business are legally the same. Personal assets are at risk.
* **LLC (Limited Liability Company)** – Protects your personal assets and offers flexibility in taxation. Common choice for solo practitioners.
* **PLLC (Professional LLC)** – Required in some states for licensed professionals (e.g., therapists, doctors).
* **S-Corporation** – Tax-efficient for some practices once revenue grows. Allows you to pay yourself a salary + dividends.
* **C-Corporation** – Rarely used for solo practices but useful if you plan to scale with multiple providers and investors.

👉 *Tip: Consult with an accountant or attorney to choose the best structure for your state and goals.*

**2. Securing Identifiers**

To operate as a healthcare provider, you need the following:

* **EIN (Employer Identification Number)**
  + Issued by the IRS, used for taxes and payroll.
  + Even if you’re a solo practitioner, you should have an EIN separate from your SSN.
* **NPI (National Provider Identifier)**
  + **NPI 1** – Individual provider ID.
  + **NPI 2** – Organization/practice ID (if billing as a group or entity).
* **CAQH (Council for Affordable Quality Healthcare)**
  + A centralized credentialing database used by insurance companies.
  + You’ll re-attest every 120 days to stay active.

👉 *Tip: Get these in place early so credentialing, billing, and compliance won’t be delayed later.*

**3. Clarifying Your Scope, Niche & Services**

This is where you design the practice you actually want. Ask yourself:

* Who do I most want to serve? (e.g., teens, couples, trauma survivors, veterans)
* What services will I provide? (individual therapy, group therapy, telehealth, workshops)
* What won’t I provide? (set boundaries early to avoid burnout)
* What’s my differentiator? (your unique story, training, or approach)

👉 *Tip: The clearer your niche, the easier it is to attract your ideal clients and grow sustainably.*

**🛠️ Tools & Worksheets**

**Entity & Identifier Checklist**

☑ Choose your entity type (Sole Prop / LLC / PLLC / S-Corp)  
☑ File formation paperwork with your state  
☑ Apply for EIN (IRS.gov)  
☑ Apply for NPI 1 (individual)  
☑ Apply for NPI 2 (if billing as a practice entity)  
☑ Register for CAQH and set reminders for re-attestation

**Practice Vision Canvas**

*(Fill in the prompts below to begin designing your practice blueprint)*

**My Ideal Clients Are:**

**The Services I Will Offer Are:**

**What Makes My Practice Unique:**

**Where I See My Practice in 3 Years:**

**Policy Draft Starter**

Begin drafting your foundational policies. These don’t need to be perfect — they will evolve. Examples:

* **Cancellation Policy** (24–48 hours notice, fee for late cancellations)
* **Payment Policy** (card on file, insurance billing, copays due at service)
* **Communication Policy** (secure messaging only, response times, emergency contacts)

👉 *Tip: Put policies in writing early — it reduces confusion and protects your boundaries.*

**✨ Reflection Exercise**

Take 5–10 minutes to write your thoughts:

* *What excites me most about creating my own practice?*
* *What fears or doubts come up when I think about this step?*
* *If I could design my dream practice without limitations, what would it look like?*

Leave space here for journaling:

**🌐 Helpful Websites & Resources**

* **IRS – EIN Application:** <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>
* **National Plan & Provider Enumeration System (NPPES):** <https://nppes.cms.hhs.gov/>
* **CAQH ProView – Credentialing Database:** <https://proview.caqh.org/>
* **Small Business Administration – Business Structures:** <https://www.sba.gov/business-guide/launch-your-business/choose-business-structure>
* **State Secretary of State Portal:** *(Search “Secretary of State [Your State] business filing” for your local site)*

✅ **Standardized Format Across All Modules:**  
Every module will follow this same flow:

1. 🎯 **Learning Goals**
2. 📖 **Teaching Content**
3. 🛠️ **Tools & Worksheets**
4. ✨ **Reflection Exercise**
5. 🌐 **Helpful Websites & Resources**

**Module 2 — Risk & Readiness: Insurance & HIPAA**

**🎯 Learning Goals**

By the end of this module, you will:

* Understand why professional liability insurance is essential for your practice.
* Know the basics of HIPAA compliance and what systems you need in place.
* Learn how to set up secure communication with clients.
* Begin drafting your core intake and compliance forms.

**📖 Teaching Content**

**1. Professional Liability (Malpractice) Insurance**

Even the best clinicians need coverage. Liability insurance protects you against lawsuits, board complaints, and accidental HIPAA breaches.

Common options:

* **Individual Policy** – Covers you as a solo provider.
* **Group Policy** – Covers your practice if you employ others.
* **Occurrence vs. Claims-Made Policies:**
  + *Occurrence* covers incidents that happen while your policy is active, no matter when they’re reported.
  + *Claims-Made* covers claims only if both the incident and the report occur while the policy is active.

👉 *Tip: Most new clinicians start with an individual occurrence-based policy.*

**2. HIPAA Compliance Essentials**

HIPAA (Health Insurance Portability and Accountability Act) sets standards for protecting patient information.

Key areas to secure:

* **Data Storage** – Use HIPAA-compliant EMRs and encrypted storage.
* **Communication** – Emails, texts, and video calls must be secure and compliant.
* **Policies & Training** – Document your privacy practices, obtain client consent, and train staff (if applicable).
* **BAA (Business Associate Agreements)** – Required with any vendor that handles PHI (e.g., billing software, telehealth platforms).

👉 *Tip: Document everything. If audited, proof of your compliance process is just as important as the systems themselves.*

**3. Secure Communication Options**

HIPAA requires secure communication channels. Options include:

* **HIPAA-Compliant Email Services** – GSuite w/ HIPAA BAA, ProtonMail (enterprise), Paubox.
* **Secure Messaging Apps** – Spruce Health, Signal (for encrypted messaging), Luminello.
* **Telehealth Platforms** – Doxy.me, SimplePractice, Zoom for Healthcare.

👉 *Tip: Never use personal Gmail, text messaging, or FaceTime with clients — these are not HIPAA compliant.*

**4. Essential Forms to Draft**

Start with these:

* **Informed Consent for Treatment**
* **Notice of Privacy Practices (NPP)**
* **Telehealth Consent**
* **Release of Information (ROI)**
* **Emergency Contact Form**

👉 *Tip: Templates can be customized to your practice — avoid copying from peers without legal review.*

**🛠️ Tools & Worksheets**

**Insurance Comparison Table**

*(Use this to compare quotes from at least 3 providers)*

| **Provider** | **Type (Occurrence/Claims-Made)** | **Annual Premium** | **Coverage Limits** | **Add-Ons (Telehealth, Board Defense)** | **Notes** |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
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**BAA Vendor Tracker**

☑ EMR Provider  
☑ Billing Service  
☑ Telehealth Platform  
☑ Cloud Storage Provider  
☑ Email/Communication Platform

*Note: Keep copies of all signed BAAs in a secure folder.*

**Forms Starter Pack**

* Draft your **Informed Consent** using your state board requirements.
* Include your **Notice of Privacy Practices (NPP)**.
* Add a **Telehealth Consent** if offering online services.
* Have a standard **Release of Information (ROI)** ready.

**✨ Reflection Exercise**

Take 10 minutes to reflect:

* *How confident do I feel about my current legal protections?*
* *Where am I most at risk right now (insurance, communication, forms)?*
* *What is one compliance step I can complete this week to feel more secure?*

Journal Space:

**🌐 Helpful Websites & Resources**

* **APA Insurance Trust (Liability Coverage):** [https://www.apait.org](https://www.apait.org/)
* **CM&F Group (Professional Liability):** [https://www.cmfgroup.com](https://www.cmfgroup.com/)
* **HPSO (Healthcare Providers Service Organization):** [https://www.hpso.com](https://www.hpso.com/)
* **HHS – HIPAA Compliance Overview:** <https://www.hhs.gov/hipaa/for-professionals>
* **HIPAA-Compliant Telehealth (Doxy.me):** [https://doxy.me](https://doxy.me/)
* **HIPAA-Compliant Messaging (Spruce Health):** [https://www.sprucehealth.com](https://www.sprucehealth.com/)

✅ With this, Modules 1 & 2 are fully fleshed out in the same format.

Would you like me to **continue building each module sequentially** (Module 3 next), or would you prefer that I **first draft all 10 modules’ Helpful Resources sections** so you can approve the links before I dive into the full teaching content for each?

**Module 3 — Paneling Pathways: Credentialing**

**🎯 Learning Goals**

By the end of this module, you will:

* Understand the basics of credentialing and insurance panel applications.
* Learn how to select the right insurance payers for your practice.
* Gain strategies for tracking applications and staying organized.
* Build confidence in following up with panels and payers.

**📖 Teaching Content**

**1. What is Credentialing?**

Credentialing is the process by which insurance companies verify your qualifications, licenses, and compliance before allowing you to bill clients under their plans.

This involves:

* Submitting a **credentialing packet** (licenses, malpractice insurance, NPI, CAQH).
* Waiting through a **review process** (often 60–120 days).
* Signing a **contract** once approved.

👉 *Tip: Credentialing is often the longest bottleneck in launching a practice — start early!*

**2. Selecting the Right Payers**

Not all insurance panels are equal. Consider:

* **Demographics:** Which insurers do your ideal clients use?
* **Rates:** Some pay significantly higher than others.
* **Requirements:** Certain insurers are more paperwork-heavy.
* **Availability:** Some panels are closed to new providers — but persistence can pay off.

👉 *Tip: Start with 2–3 key panels instead of trying to credential with every insurer at once.*

**3. Submitting Applications**

Applications usually require:

* State license(s)
* Malpractice insurance certificate
* NPI 1 & 2
* CAQH profile (updated & accurate)
* W-9 form with your EIN

👉 *Tip: Always keep a digital “credentialing folder” with these documents ready to resend.*

**4. Contracts & Next Steps**

Once approved:

* **Review your contract carefully** — note reimbursement rates, termination clauses, and billing timelines.
* **Keep track of credentialing dates** — re-credentialing is required every few years.
* **Maintain updated CAQH attestation** — every 120 days.

**🛠️ Tools & Worksheets**

**Credentialing Checklist**

☑ Update CAQH profile  
☑ Collect copies of licenses & certifications  
☑ Secure malpractice insurance certificate  
☑ Prepare W-9 with EIN  
☑ Organize NPI documentation  
☑ Save digital copies in credentialing folder

**Paneling Tracker Table**

*(Use this to monitor progress with each insurance company)*

| **Insurance Payer** | **Application Date** | **Contact Person** | **Status (Pending/Approved)** | **Notes** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
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**Email Follow-Up Scripts**

**Initial Follow-Up (2 weeks after submission):**  
*"Hello [Rep Name], I wanted to confirm the status of my credentialing application submitted on [date]. Please let me know if any additional documentation is required. Thank you!"*

**Polite Persistence (after 30+ days):**  
*"Hello [Rep Name], I’m following up on my application with [Insurance Company]. I remain very interested in joining your panel and would appreciate any updates on my timeline for approval. Thank you for your assistance."*

**✨ Reflection Exercise**

* *Which insurance panels align best with the clients I want to serve?*
* *How do I feel about the timeline and paperwork involved?*
* *What support or accountability would help me stay on track with credentialing?*

Journal Space:

**🌐 Helpful Websites & Resources**

* **CAQH ProView (Credentialing Profile):** <https://proview.caqh.org/>
* **CAQH Help Desk:** <https://caqh.force.com/>
* **Provider Enrollment Portal – Medicare PECOS:** <https://pecos.cms.hhs.gov/pecos>
* **State Medicaid Enrollment (varies by state):** *(Google “Medicaid provider enrollment [Your State]”)*
* **Insurance Payer Directories:** Most insurers have provider enrollment pages — search “[Insurance Company] provider credentialing.”

**Module 4 — Platform Partners: SonderMind & Headway**

**🎯 Learning Goals**

By the end of this module, you will:

* Understand how third-party platforms like SonderMind and Headway can jump-start your private practice.
* Learn the requirements to join each platform.
* Discover how to optimize your provider profiles for client attraction.
* Understand payment processes, claims handling, and exit strategies.

**📖 Teaching Content**

**1. What Are Platform Partners?**

Platforms such as **SonderMind** and **Headway** connect clients to therapists, handle billing/insurance claims, and provide visibility through their networks.

They can:

* Provide **instant access to clients** without the need to market heavily.
* Handle **billing & claims submission** so you can focus on therapy.
* Offer **support tools** like scheduling, telehealth platforms, and reminders.

👉 *Tip: Platforms can be a great starting point — but avoid relying on them long-term as your only referral source.*

**2. Requirements to Join**

Typical requirements include:

* Active state license in good standing.
* Malpractice insurance (proof required).
* NPI and CAQH profile.
* Willingness to accept insurance-based reimbursement rates.

👉 *Tip: Make sure your CAQH is up-to-date before applying — both SonderMind and Headway use it for verification.*

**3. Optimizing Your Profile**

A strong provider profile helps you stand out. Include:

* **Professional photo** (high-quality, approachable, clear background).
* **Specialties** (list your top 2–3 niches clearly).
* **Therapeutic approach** (CBT, EMDR, trauma-informed, etc.).
* **Client-focused language** (“I help people who feel overwhelmed by…” rather than clinical jargon).

👉 *Tip: Think of your profile as marketing — speak directly to the client you most want to attract.*

**4. Payments & Claims**

* **SonderMind**: Pays directly via ACH after claim processing. They manage claim submission with insurers.
* **Headway**: Handles scheduling, billing, and payer relationships. You receive direct deposit.
* Both deduct their fees automatically before paying you.

👉 *Tip: Compare payout timelines and reimbursement rates before committing to one platform exclusively.*

**5. Exit & Mix Strategy**

* Use platforms to **fill your caseload quickly**.
* As your own referrals increase, **transition more clients to your private pay or direct insurance paneling.**
* Avoid building your entire practice on a single platform — this limits control over branding, fees, and client retention.

**🛠️ Tools & Worksheets**

**Platform Comparison Table**

| **Feature** | **SonderMind** | **Headway** | **Notes** |
| --- | --- | --- | --- |
| Insurance Panels | Multiple major carriers | Multiple major carriers |  |
| Payout Timeline | ACH after claim process | Direct deposit weekly |  |
| Fees/Commissions | Built into reimbursement | Built into reimbursement |  |
| Telehealth Option | Yes | Yes |  |
| Marketing Support | Client referrals | Client referrals |  |

**Profile Copy Template**

*"I work with [specific clients] who struggle with [specific challenges]. My approach combines [therapeutic modalities] with a focus on [unique differentiator]. Clients who work with me often say they feel [desired outcomes]."*

**Weekly Capacity Planner**

| **Week of: \_\_\_\_\_\_\_\_** | **Goal: \_\_\_\_\_\_\_\_ Clients** | **Platform Clients** | **Private Clients** | **Notes** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |

**✨ Reflection Exercise**

* *How do I feel about using third-party platforms as part of my practice growth?*
* *What risks might I face if I rely too heavily on them?*
* *What’s my timeline for transitioning to more direct referrals and private pay clients?*

Journal Space:

**🌐 Helpful Websites & Resources**

* **SonderMind (Therapist Sign-Up):** <https://www.sondermind.com/for-providers>
* **Headway (Therapist Sign-Up):** <https://joinheadway.com/providers>
* **Psychology Today Directory (Profile Marketing):** <https://www.psychologytoday.com/us/therapists>
* **TherapyDen Directory (Alternative to PT):** <https://www.therapyden.com/>
* **Zencare (Curated Directory):** <https://zencare.co/>

**Module 5 — EMRs & Workflow**

**🎯 Learning Goals**

By the end of this module, you will:

* Understand the role of Electronic Medical Records (EMRs) in private practice.
* Compare popular EMR platforms for features, compliance, and cost.
* Learn how to design efficient workflows to save time and reduce stress.
* Develop habits for documentation and automation that support client care and business growth.

**📖 Teaching Content**

**1. Why EMRs Matter**

An EMR is more than a charting system — it’s the **hub of your practice operations.**  
A good EMR helps with:

* Scheduling and reminders
* Secure client communication
* Documentation and treatment planning
* Insurance claim submission
* Payment processing

👉 *Tip: Don’t try to manage clients with spreadsheets or paper files — EMRs keep you compliant and organized.*

**2. Popular EMRs for Private Practice**

Commonly used platforms include:

* **SimplePractice** – Widely used; strong telehealth integration.
* **TheraNest** – Affordable, with group practice features.
* **TherapyNotes** – Excellent for billing and insurance claims.
* **Luminello** – User-friendly, psychiatry-friendly.
* **Kareo** – Medical-grade EMR, heavier setup, great for larger clinics.

👉 *Tip: Most EMRs offer free trials. Test 2–3 before committing.*

**3. Setting Up Workflows**

Your EMR becomes powerful when paired with consistent workflows:

* **Intake Process:** Client schedules → auto email with intake forms → forms uploaded to EMR → first session notes ready.
* **Session Notes:** Complete within 24 hours. Templates can save time.
* **Billing Workflow:** Submit claims same day → reconcile payments weekly → track denials monthly.

**4. Documentation Standards**

* Always document session date, time, type, and interventions used.
* Keep notes concise but clinically relevant.
* Use EMR templates to ensure consistency (e.g., SOAP notes).
* Store treatment plans and ROI forms directly in the EMR.

**5. Automation Tips**

* Automate appointment reminders via text/email.
* Use recurring billing for private pay clients.
* Schedule recurring reports for finances.
* Leverage integrations (e.g., with QuickBooks or Stripe).

👉 *Tip: Automation reduces burnout — let technology handle repetitive tasks.*

**🛠️ Tools & Worksheets**

**EMR Comparison Matrix**

| **Feature** | **SimplePractice** | **TheraNest** | **TherapyNotes** | **Luminello** | **Notes** |
| --- | --- | --- | --- | --- | --- |
| Cost (monthly) |  |  |  |  |  |
| Insurance Claim Support |  |  |  |  |  |
| Telehealth Integration |  |  |  |  |  |
| Client Portal |  |  |  |  |  |
| Group Practice Support |  |  |  |  |  |

**Setup Checklist**

☑ Import logo & practice info into EMR  
☑ Customize intake forms  
☑ Upload informed consent & HIPAA policies  
☑ Set up billing/payment system  
☑ Test telehealth platform  
☑ Train any staff/assistants

**Note Template Prompts (SOAP Format)**

* **S (Subjective):** What did the client report today?
* **O (Objective):** Observations, mental status, mood.
* **A (Assessment):** Clinical impression, progress toward goals.
* **P (Plan):** Next steps, homework, future goals.

**✨ Reflection Exercise**

* *What administrative tasks take me the most time each week?*
* *How could an EMR help reduce my stress and improve client care?*
* *What features matter most to me when choosing an EMR (cost, claims, telehealth, ease of use)?*

Journal Space:

**🌐 Helpful Websites & Resources**

* **SimplePractice:** [https://www.simplepractice.com](https://www.simplepractice.com/)
* **TheraNest:** [https://www.theranest.com](https://www.theranest.com/)
* **TherapyNotes:** [https://www.therapynotes.com](https://www.therapynotes.com/)
* **Luminello:** [https://www.luminello.com](https://www.luminello.com/)
* **Kareo:** [https://www.kareo.com](https://www.kareo.com/)
* **HIPAA Documentation Guidelines (HHS):** <https://www.hhs.gov/hipaa>

**Module 6 — Claims 101: Coding & Billing**

**🎯 Learning Goals**

By the end of this module, you will:

* Understand the basics of CPT and ICD-10 codes used in therapy billing.
* Learn the lifecycle of a claim from submission to payment.
* Gain strategies for reconciling payments and avoiding common errors.
* Know how to handle denials and appeals effectively.

**📖 Teaching Content**

**1. CPT & ICD-10 Basics**

* **CPT Codes (Current Procedural Terminology):** Identify the service you provided.
  + Examples: 90791 (initial intake), 90837 (60-min therapy), 90834 (45-min therapy), 90853 (group therapy).
* **ICD-10 Codes:** Identify the diagnosis for billing purposes.
  + Examples: F32.1 (Major depressive disorder, moderate), F41.1 (Generalized anxiety disorder).

👉 *Tip: Always match CPT codes to accurate ICD-10 codes. Insurance will deny mismatched claims.*

**2. The Claim Lifecycle**

1. **Session Provided** → document in EMR.
2. **Claim Created** → EMR generates a “clean claim.”
3. **Claim Submission** → sent electronically to payer (via clearinghouse).
4. **Payer Processing** → insurance reviews for accuracy, coverage, eligibility.
5. **Payment / EOB (Explanation of Benefits)** → paid directly to you or platform.
6. **Client Responsibility** → co-pays, deductibles collected.

**3. Reconciling Payments**

* Review **EOBs** (Explanation of Benefits) for each payment.
* Match payments to client accounts in your EMR.
* Record denials or partial payments for follow-up.
* Reconcile accounts weekly to avoid lost revenue.

**4. Denials & Appeals**

Common denial reasons:

* Incorrect CPT/ICD-10 pairing.
* Missing client information.
* Expired or inactive insurance coverage.
* Provider not credentialed with payer.

Appeals process:

* Review denial code.
* Correct and resubmit claim if possible.
* If necessary, submit an appeal letter with supporting documentation.

👉 *Tip: Track denials in a spreadsheet or EMR report — repeated patterns often indicate a workflow fix.*

**🛠️ Tools & Worksheets**

**Clean Claim Checklist**

☑ Verify client insurance eligibility before first session.  
☑ Confirm CPT code matches session provided.  
☑ Ensure ICD-10 code is valid and matches diagnosis.  
☑ Include provider NPI, EIN, and practice information.  
☑ Double-check co-pay/deductible responsibility.

**Denial & Appeal Tracker**

| **Client Name** | **Date of Claim** | **Denial Code** | **Reason** | **Resubmission Date** | **Outcome** |
| --- | --- | --- | --- | --- | --- |
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**Superbill Template**

Provide to private pay clients who seek out-of-network reimbursement.

**Superbill should include:**

* Provider name, NPI, and EIN.
* Client name and DOB.
* Date of service and CPT code.
* Diagnosis (ICD-10 code).
* Session fee paid.
* Provider signature.

**✨ Reflection Exercise**

* *How comfortable am I with billing and coding right now?*
* *What systems can I set up to prevent errors and denials?*
* *How will I manage the stress of claims work without burning out?*

Journal Space:

**🌐 Helpful Websites & Resources**

* **CMS CPT Code Lookup:** <https://www.ama-assn.org/practice-management/cpt>
* **ICD-10 Codes (WHO):** <https://icd.who.int/browse10/2019/en>
* **CMS Billing & Coding Guidelines:** <https://www.cms.gov/medicare>
* **Clearinghouse Example (Office Ally):** [https://www.officeally.com](https://www.officeally.com/)
* **Explanation of Benefits Guide (BCBS):** <https://www.bcbs.com/understanding-explanation-benefits>

**Module 7 — Place of Service: Virtual, Physical, Hybrid**

**🎯 Learning Goals**

By the end of this module, you will:

* Understand the pros and cons of physical, virtual, and hybrid practice models.
* Learn what’s required to set up a compliant office space (physical or online).
* Gain tools for budgeting your practice location.
* Draft safety and incident response plans for client and provider protection.

**📖 Teaching Content**

**1. Physical Office Setup**

**Pros:** Professional presence, walk-in visibility, separation of work/home.  
**Cons:** Higher overhead, lease commitments, utilities, cleaning.

Requirements:

* Secure, private space with soundproofing if possible.
* Furniture: desk, therapy chairs, waiting room seating.
* HIPAA-compliant storage for records.
* Accessibility (ADA compliance).

👉 *Tip: Start small (sublet or hourly office rental) before committing to a full lease.*

**2. Virtual Office Setup**

**Pros:** Low overhead, flexibility, access to clients across your state.  
**Cons:** Requires reliable tech, can feel less personal, internet issues.

Requirements:

* HIPAA-compliant telehealth platform (Doxy.me, SimplePractice, Zoom Healthcare).
* Secure, professional-looking background for sessions.
* High-speed internet and good audio/video setup.

👉 *Tip: Test your setup before sessions — lighting and sound matter for client experience.*

**3. Hybrid Office Setup**

Combines both in-person and telehealth services.

* Allows flexibility for clients.
* Can expand client base while retaining in-person presence.
* Requires clear scheduling systems and boundary management.

👉 *Tip: Use EMR scheduling tools to separate virtual and in-person availability.*

**4. Safety & Incident Planning**

Every practice should have basic safety policies:

* **Physical Office:** Evacuation plan, panic button or duress alarm, secure client records.
* **Virtual Office:** Emergency contact form for each client, know local emergency numbers, document safety plan for telehealth.
* **General:** Have liability coverage that includes both in-person and telehealth services.

**🛠️ Tools & Worksheets**

**Office Setup Budget Worksheet**

| **Item** | **Estimated Cost** | **Actual Cost** | **Notes** |
| --- | --- | --- | --- |
| Office Rent/Lease |  |  |  |
| Furniture & Décor |  |  |  |
| HIPAA Storage |  |  |  |
| Utilities/Internet |  |  |  |
| Telehealth Platform |  |  |  |

**Safety & Incident Plan Template**

1. Emergency exits and procedures.
2. Emergency contacts for each client.
3. Crisis protocol (client expresses suicidal intent, violence, etc.).
4. Incident report form for documentation.

**Telehealth Readiness Checklist**

☑ HIPAA-compliant telehealth platform set up.  
☑ Secure, professional background in video sessions.  
☑ High-quality camera and microphone tested.  
☑ Backup plan for internet outage (phone session, reschedule policy).  
☑ Emergency contact and location collected for each client.

**✨ Reflection Exercise**

* *Which model (physical, virtual, hybrid) best fits my lifestyle and client needs right now?*
* *What financial or logistical barriers do I need to address for my chosen model?*
* *How can I ensure safety and compliance in whichever model I select?*

Journal Space:

**🌐 Helpful Websites & Resources**

* **Doxy.me (Telehealth Platform):** [https://doxy.me](https://doxy.me/)
* **SimplePractice Telehealth:** <https://www.simplepractice.com/telehealth>
* **Zoom for Healthcare:** <https://zoom.us/healthcare>
* **ADA Accessibility Standards:** <https://www.ada.gov/resources/2010-ada-standards/>
* **OSHA Safety Guidelines for Offices:** <https://www.osha.gov/office-safety>
* **APA Telepsychology Guidelines:** <https://www.apa.org/practice/guidelines/telepsychology>

**Module 8 — Marketing Engine**

**🎯 Learning Goals**

By the end of this module, you will:

* Understand the foundations of private practice marketing.
* Learn how to position yourself in the marketplace.
* Explore online and offline strategies to attract clients.
* Gain tools to track and measure marketing effectiveness.

**📖 Teaching Content**

**1. Positioning Your Brand**

Positioning is how you differentiate yourself in the minds of clients.

* Define your **niche** clearly (e.g., “I help first responders manage trauma”).
* Use **client-centered language** (“I help people who…”).
* Align your **practice values** with your brand identity (e.g., inclusive, holistic, trauma-informed).

👉 *Tip: Marketing starts with clarity — the clearer your message, the easier it is for clients to find you.*

**2. Website & Directories**

Your online presence is your digital office.

* **Website**: Create a simple, professional site with bio, services, fees, and scheduling.
* **Therapist Directories**: Psychology Today, TherapyDen, Zencare, Open Path.
* **SEO Basics**: Use keywords your clients search (“anxiety therapist near me”).

👉 *Tip: If budget is tight, start with a directory profile before building a full website.*

**3. Referral Sources**

Referrals remain one of the strongest ways to grow a practice.

* Build relationships with physicians, schools, EAPs, and community leaders.
* Network with other therapists — refer to one another based on specialties.
* Provide value (e.g., free talks, handouts) to referral partners.

**4. Content Flywheel**

Content builds credibility and trust over time.

* Blog posts, newsletters, social media posts.
* Short videos answering common mental health questions.
* Webinars or workshops for the community.
* Repurpose content across platforms.

👉 *Tip: Consistency beats perfection — post regularly rather than waiting for the “perfect” post.*

**5. Tracking Numbers**

Track key marketing metrics:

* Website visitors
* Directory profile views
* Referrals received and converted to clients
* Social media engagement
* Cost per new client acquisition

👉 *Tip: What gets measured gets improved. Use simple spreadsheets or Google Analytics.*

**🛠️ Tools & Worksheets**

**30-Day Marketing Plan Template**

Week 1: Set up/refine website or directory profile  
Week 2: Reach out to 5 referral partners  
Week 3: Post 2 pieces of content (blog/social media)  
Week 4: Review analytics and adjust

**Intake Call Script**

*"Thank you for reaching out. Can you tell me a little about what brought you here today? Here’s how I typically work with clients: [share brief process]. Does that sound like what you’re looking for?"*

**Referral Outreach Log**

| **Date** | **Referral Partner** | **Contact Method** | **Notes/Outcome** | **Next Follow-Up** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |

**✨ Reflection Exercise**

* *What marketing strategies feel most natural and authentic to me?*
* *Who are 3 people or organizations I could reach out to this month for referrals?*
* *How comfortable am I with sharing content publicly — and what fears hold me back?*

Journal Space:

**🌐 Helpful Websites & Resources**

* **Psychology Today Directory:** <https://www.psychologytoday.com/us/therapists>
* **TherapyDen Directory:** [https://www.therapyden.com](https://www.therapyden.com/)
* **Zencare Directory:** <https://zencare.co/>
* **Open Path Collective (Low-Cost Network):** <https://openpathcollective.org/>
* **Squarespace (Easy Websites):** [https://www.squarespace.com](https://www.squarespace.com/)
* **Canva (Design for Marketing):** [https://www.canva.com](https://www.canva.com/)
* **Google Analytics:** [https://analytics.google.com](https://analytics.google.com/)

**Module 9 — Money Mastery**

**🎯 Learning Goals**

By the end of this module, you will:

* Understand fee-setting strategies for your private practice.
* Learn how to analyze payer mix and utilization.
* Gain confidence in basic bookkeeping practices.
* Identify and track key financial performance indicators (KPIs).

**📖 Teaching Content**

**1. Fee Strategies**

* **Market Research:** What are other therapists in your area charging?
* **Cost-Based Pricing:** Ensure your fees cover expenses and desired income.
* **Value-Based Pricing:** Align fees with the value and transformation you provide.
* **Sliding Scale:** Can help fill your caseload, but use intentionally (limit # of clients).

👉 *Tip: Undercharging leads to burnout — price sustainably from the start.*

**2. Payer Mix & Utilization**

* **Payer Mix** = the breakdown of your revenue sources: insurance vs. private pay vs. EAPs.
* Diversify so you’re not overly dependent on one insurance company.
* Monitor utilization — which services (individual, couples, groups) generate the most revenue?

👉 *Tip: A healthy practice often balances 2–3 insurance panels with 20–30% private pay clients.*

**3. Bookkeeping Basics**

* **Track income & expenses** monthly.
* **Separate bank account** for business.
* Use software like **QuickBooks, Wave, or Xero**.
* Save for taxes (25–30% of income in a separate account).
* Reconcile accounts monthly to avoid surprises.

**4. Key Performance Indicators (KPIs)**

Monitor these regularly:

* Monthly revenue
* Average fee per client session
* No-show and cancellation rate
* Client retention (average # of sessions per client)
* Profit margin

👉 *Tip: Reviewing KPIs monthly helps you make small adjustments before issues become major.*

**🛠️ Tools & Worksheets**

**Budget & Forecast Spreadsheet**

| **Month** | **Expected Income** | **Actual Income** | **Expenses** | **Profit/Loss** | **Notes** |
| --- | --- | --- | --- | --- | --- |
| Jan |  |  |  |  |  |
| Feb |  |  |  |  |  |

**Pricing & Payer Mix Calculator**

* **Average Session Fee:** $\_\_\_\_\_
* **Insurance Reimbursements:** $\_\_\_\_\_
* **Private Pay Sessions:** \_\_\_\_%
* **Insurance Sessions:** \_\_\_\_%
* **Target Payer Mix:** \_\_\_\_% private, \_\_\_\_% insurance

**Monthly Finance Close Checklist**

☑ Reconcile bank account  
☑ Review income vs. expenses  
☑ Update budget forecast  
☑ Check tax savings account balance  
☑ Record KPIs

**✨ Reflection Exercise**

* *What fears or beliefs do I hold about money that could affect my business decisions?*
* *Am I undercharging for the value I provide?*
* *What financial systems can I implement now to prevent future stress?*

Journal Space:

**🌐 Helpful Websites & Resources**

* **QuickBooks (Bookkeeping):** [https://quickbooks.intuit.com](https://quickbooks.intuit.com/)
* **Wave Accounting (Free Option):** [https://www.waveapps.com](https://www.waveapps.com/)
* **Xero Accounting:** [https://www.xero.com](https://www.xero.com/)
* **SimplePractice Fee Calculator:** <https://www.simplepractice.com/pricing-calculator>
* **IRS Small Business Taxes:** <https://www.irs.gov/businesses/small-businesses-self-employed>
* **Therapy Private Practice KPIs Guide:** [https://practiceofthepractice.com](https://practiceofthepractice.com/)

**Module 10 — Scale & Sustain**

**🎯 Learning Goals**

By the end of this module, you will:

* Understand how to build systems and standard operating procedures (SOPs) that scale.
* Explore options for hiring staff or contractors.
* Learn how to conduct quality assurance in your practice.
* Design a long-term growth roadmap for your business.

**📖 Teaching Content**

**1. Systems & SOPs**

Scaling requires consistency. SOPs (Standard Operating Procedures) document how tasks are done so you (or your team) can repeat them efficiently.  
Examples:

* Intake process workflow
* Billing and reconciliation steps
* Marketing tasks (posting schedule, referral outreach)
* Emergency and safety protocols

👉 *Tip: Document as you go — your future self (and team) will thank you.*

**2. Hiring Options**

When your caseload is full, growth means adding help. Options include:

* **Virtual Assistant (VA):** Handles admin tasks like scheduling, billing, social media.
* **Clinicians:** Contract or W-2 employees to expand services.
* **Specialists:** Bookkeepers, marketing consultants, IT support.

👉 *Tip: Start small — delegate admin first before hiring more clinicians.*

**3. Quality Assurance**

Maintaining quality is essential as you scale.

* Conduct periodic chart audits.
* Collect client feedback and satisfaction surveys.
* Review financials quarterly for efficiency.
* Track outcomes (clinical progress, no-show rates, client retention).

**4. Long-Term Growth**

Consider your 3–5 year vision:

* Expanding to group practice?
* Adding specialties (e.g., testing, psychiatry)?
* Launching additional services (workshops, CEUs, retreats)?
* Transitioning to more leadership, less clinical work?

👉 *Tip: Scaling doesn’t always mean “bigger” — it can also mean more freedom and sustainability.*

**🛠️ Tools & Worksheets**

**SOP Template Pack**

*(fill in your steps for each routine task)*

* Task: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Steps: 1. \_\_\_\_\_\_\_\_\_\_ 2. \_\_\_\_\_\_\_\_\_\_ 3. \_\_\_\_\_\_\_\_\_\_
* Tools/Software Used: \_\_\_\_\_\_\_\_\_\_\_
* Person Responsible: \_\_\_\_\_\_\_\_\_\_\_

**QA Audit Checklist**

☑ Randomly review 5 client charts each month.  
☑ Verify billing accuracy against EOBs.  
☑ Audit compliance documents (consents, HIPAA).  
☑ Collect at least 1 client feedback form per quarter.  
☑ Review outcomes and KPIs.

**Growth Roadmap Template**

| **Timeframe** | **Goal** | **Action Steps** | **Resources Needed** | **Success Measure** |
| --- | --- | --- | --- | --- |
| 6 Months |  |  |  |  |
| 1 Year |  |  |  |  |
| 3 Years |  |  |  |  |

**✨ Reflection Exercise**

* *What’s my ideal role in my practice 3–5 years from now?*
* *Do I want to grow into a group practice, or stay intentionally small?*
* *What systems can I start documenting today to prepare for scaling?*

Journal Space:

**🌐 Helpful Websites & Resources**

* **Society for Human Resource Management (Hiring Resources):** [https://www.shrm.org](https://www.shrm.org/)
* **Upwork (Virtual Assistants/Freelancers):** [https://www.upwork.com](https://www.upwork.com/)
* **Indeed (Hiring Clinicians):** [https://www.indeed.com](https://www.indeed.com/)
* **HIPAA Audit Checklist (HHS):** <https://www.hhs.gov/hipaa/for-professionals/compliance-enforcement/audit>
* **Practice of the Practice Growth Resources:** [https://practiceofthepractice.com](https://practiceofthepractice.com/)

**Final Section — Action Plan**

**🎯 Purpose**

This section helps you pull everything together into concrete next steps so you can confidently launch and grow your practice.

**🛠️ First 30 Days Checklist**

☑ Choose entity type and file paperwork  
☑ Apply for EIN, NPI, and CAQH  
☑ Purchase malpractice insurance  
☑ Draft informed consent and HIPAA forms  
☑ Select EMR and set up workflows  
☑ Decide office model (virtual/physical)  
☑ Launch directory profile or website  
☑ Reach out to at least 3 referral partners  
☑ Create budget and open business bank account  
☑ Write 1–2 SOPs for repeat tasks

**✨ Notes & Reflections Pages**

*(Blank pages for journaling, tracking progress, and writing lessons learned)*

**Appendix A — Therapy Modalities**

**Modalities That Typically Do *Not* Require Additional Certification**

*(Training is recommended, but certification is not mandatory to practice ethically within your scope)*

* **Cognitive Behavioral Therapy (CBT)** – Core skills taught in most counseling programs.
* **Person-Centered Therapy** – Humanistic approach, no separate certification.
* **Motivational Interviewing (MI)** – Widely taught, can be practiced after workshops.
* **Solution-Focused Brief Therapy (SFBT)** – Training helpful, but no official certification required.
* **Narrative Therapy** – Skill-based, often taught in CEUs.
* **Mindfulness-Based Techniques** – Often included in workshops/CEUs.

**Modalities That *Do* Require Certification or Specialized Training**

*(Certification ensures adherence to protocol, fidelity, and ethical practice)*

* **Dialectical Behavior Therapy (DBT)** – Intensive training program required.
* **Eye Movement Desensitization and Reprocessing (EMDR)** – Must complete EMDRIA-approved training.
* **Somatic Experiencing (SE)** – 3-year certification program.
* **Internal Family Systems (IFS)** – Official IFS Institute training required for certification.
* **Neurofeedback/Biofeedback** – Specialized certification required.
* **Play Therapy (RPT – Registered Play Therapist)** – Credential through Association for Play Therapy.
* **Hypnotherapy** – Certification through approved organizations.

👉 *Tip: Offering evidence-based, certified methods can expand referral opportunities and allow higher fees — but don’t overlook the power of well-delivered, non-certification approaches that you already have skills for.*

**Appendix B — Best Practices for Marketing**

**Marketing to Cash-Pay Clients**

* Build a strong **brand story** — focus on transformation, not insurance coverage.
* Offer **specialized services** (niche marketing: trauma, couples, athletes, veterans).
* Highlight **convenience and privacy** — no diagnosis required, flexible scheduling.
* Create **value-added packages** (e.g., 6 sessions + workbook + text support).
* Develop **content marketing** (blogs, workshops, podcasts) to show authority.
* Partner with **local businesses or wellness providers** (gyms, yoga studios, nutritionists).

**Marketing to Insurance Clients**

* Highlight **insurance acceptance** in directories and your website.
* Maintain an updated **Psychology Today profile** with insurance panels listed.
* Build strong relationships with **primary care physicians** and **community clinics** for referrals.
* Join **EAP (Employee Assistance Programs)** — often underutilized but steady referral sources.
* Track **payer mix** so you don’t become dependent on a single insurer.
* Make billing easy: advertise “We file your claims for you.”

👉 *Best practice: Blend both strategies. Insurance can fill your caseload quickly, while cash-pay clients provide higher margins and reduce dependency on insurers.*

**Closing Words of Encouragement**

*Launching a private practice is not just a business venture — it’s a leap of faith into your purpose. The process may feel overwhelming at times. Some months will be slower than you hoped, and progress may not always be linear. But remember: success rarely happens overnight.*

*Every client you serve, every policy you write, every claim you submit — it all adds up. Brick by brick, you are building something meaningful. Trust the process. Stay patient with yourself. Keep showing up consistently. Your practice doesn’t need to “boom” instantly — perseverance, consistency, and alignment with your passion will make it happen.*

*The clients who need you most are already on their way. Keep going — your future practice is waiting for you.*