

The Rose Center for Learning presents:

HOW TO BUILD A PRIVATE PRACTICE 101



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WHY ARE WE HERE?

You say why

I say why

THE TOP MISTAKES

1. Failing to set up systems for your future practice
2. Failing to put the right people first
3. Failing to see your practice as a business
4. Failing to see you need more than clinical skills
5. Failing to clarify your roles for yourself and others
6. Failing to consider divorcing from insurance companies

NUTS & BOLTS

- Who?
- Why?
- Where?
- When?
- How?

THE WHO

- Who are you allowed to help?
 - (The SCOPE OF PRACTICE)
- Who do you WANT to help?
- Who are you GOOD at helping?
- Who needs help the most?

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"Wow! You need professional help."

NUTS & BOLTS

- Who?
- Why?
- Where?
- When?
- How?

THE WHY

- Experiences
- Beliefs
- Justice
- Emotions

MISSION STATEMENT

Purpose (what your business does)

and

Values (why and how it does it).

MISSION STATEMENT

- Clear, concise, useful. Maybe inspiring.
- Avoid wordy statements full of jargon.

PURPOSE

Help Women

Give Counseling

Supervise

Train People

Build programs

VALUES

Provide high quality service

Provide superior customer service

Encourage innovation

Protect quality of client experience

Provide access to treatment

ADD THE WHY

SO THAT...

Sell shoes of the highest quality so every customer can find a pair of shoes they actually love to wear.

Provide educational services that allow children to experience learning success and become life long learners and continuing members of the community

NUTS & BOLTS

- Who?
- Why?
- Where?
- When?
- How?

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THE WHERE

- Buying/Renting/Subletting
- Sharing
- Location, location, location
- Special Considerations

NUTS & BOLTS

- Who?
- Why?
- Where?
- When?
- How?

THE WHEN

- Personal Scheduling
- Professional Scheduling
- Community Sympatico





"First, we'll look for repressed memories of malpractice suits."

NUTS & BOLTS

- Who?
- Why?
- Where?
- When?
- How?

THE HOW

1. Set-up the practice
2. Develop the practice
3. Close the practice
4. Troubleshoot the practice

SETUP

1. Policies & Procedures (Mission/Orientation/Scope of Practice/
Ethics Code, malpractice insurance, fees) **YOU**
2. Clinical Paperwork (consents, rights, charting/software,
handouts, resources list) **CLIENT**
3. Marketing (Business Cards, etc) **FUTURE CLIENT**

POLICIES & PROCEDURES

- Mission Statement
- Scope of Practice
- Code of Ethics
- Insurances
- Theoretical Orientation
- Fee Schedule
- Availability
- Technology
- Vacation/Injury/Death
- Gifts
- Interns
- Office Sharing

POLICIES & PROCEDURES

Supervision

- Why
- Who
- When
- Where
- How

POLICIES & PROCEDURES

Insurances

- Renter's Insurance
- Flood Insurance
- Malpractice Insurance

POLICIES & PROCEDURES

Theoretical Orientation

Major Theories – Used in Social Work Practice

- Systems Theory
- Psychodynamic
- Social Learning
- Conflict

Developmental Theories

- Theories of moral reasoning (Kohlberg, Gilligan)
- Theories of cognition (Piaget)
- Transpersonal theories of human development (Transpersonal – means beyond or through the persona or mask. Going beyond identity rooted in the individual body or ego to include spiritual experience or higher levels of consciousness.)
- Stage theories – Erikson

Primary Perspectives

- Strengths
- Feminist
- Eco-Systems

Current Social Work Practice Models

- Problem Solving
- Task-Centered
- Solution – Focused
- Narrative
- Cognitive-Behavioral
- Crisis

POLICIES & PROCEDURES

Fee Schedule

- Preferred Provider for Insurances
- Out of Network / Private Pay
- Combination

POLICIES & PROCEDURES

Fee Schedule: Insurances

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- Get organized (copy resume, malpractice insurance, licensure)
- Make a list (insurances vary in compensation, requirements, timelines, customer service).
- Contact Provider Relations (rapport, request app, unique clinical needs)
- Use your personal contacts
- Get an NPI, EIN and Complete the CAQH

POLICIES & PROCEDURES

Fee Schedule: Insurances

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- Copy EVERYTHING. Take Notes! Keep paper trails.
- Submit your documents in a timely manner
- Follow up. Stay on top of it.

POLICIES & PROCEDURES

Fee Schedule: Insurances

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- Tip#1: Focus on ability to save costs or other managed care needs
- Tip#2: Underserved locations
- Tip#3: Highlight languages you speak
- Tip#4: Special Hours can be helpful
- Tip#5: Work with special populations
- Tip#6: Advanced training, credentials, expertise count

POLICIES & PROCEDURES

Fee Schedule: Insurances

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- If you are denied repeatedly:
 - Ask for a “single case agreement”...then attempt to transfer to a preferred provider
 - Affiliate with another provider who is already preferred
 - Remember the needs of managed care companies

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"I give you a fifty-fifty chance. Pay me up front, and I'll make it sixty-forty."

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“Would it be possible to speak with the personality that pays the bills?”

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"Your problems make my fee seem insignificant."

POLICIES & PROCEDURES

Fee Schedule: Private Pay

- WHY to use private pay only
- HOW to set your fee (state licensing boards, NASW, colleagues)
- Morphing from insurances to private pay
- To slide or not to slide?

POLICIES & PROCEDURES

Fee Schedule: Morphing

- Why do you want to move to a cash-based practice?
- Write down your truths (values in sync with your goal)
- Set a “baby steps” goal
- Hold space for cash-paying clients
- Commit to more

POLICIES & PROCEDURES

Fee Schedule: Sliding Scale

- Identify customary fee based on your license in your area
- Identify all costs related to running your business for 12 months
- Add the annual salary that you desire to make
- Add the numbers in step 2 and 3 then divide by 12.
- Identify the number of clients that you have seen in the last year and divide by 12.

POLICIES & PROCEDURES

Fee Schedule: Sliding Scale

- Divide the minimum monthly income you need to bring in from Step 4 by the average number of clients in Step 5
- Consider what you are worth and how you value your professional self.
- Create your scale
- Exceptions to the scale?

POLICIES & PROCEDURES

Fee Schedule: Sliding Scale

- Divide the minimum monthly income you need to bring in from Step 4 by the average number of clients in Step 5
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- Gifts
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- Office Sharing

POLICIES & PROCEDURES

Availability

- Decide
- Plan
- Communicate (verbally and written)
- Coach

POLICIES & PROCEDURES

Technology

- Electronic Record
- Phone
- Email
- Texting
- Website
- Blog
- Social Media
- Billing
- Scheduling
- Forms
- Documents
- Online Sessions

POLICIES & PROCEDURES

Vacation/Injury/Death

- Consider the 24/7 expectation
- Gather supports
- Write a policy
- Communicate the policy
- ENFORCE THE POLICY :)

POLICIES & PROCEDURES

Gifts

IT DEPENDS

POLICIES & PROCEDURES

Interns/Office Sharing

CLINICAL PAPERWORK

- HIPAA Informed Consent
- HIPAA Client Rights
- Release of Information
- Intake Assessment
- Billing Invoices
- Billing Receipts
- Tracking (attendance/fees)
- Progress Notes
- Treatment Plans
- Discharge Summary
- Evals, Reports, Letters
- Handouts/Resources

MARKETING

- Website
- Business Cards
- Voicemail
- Pamphlets
- Flyers
- Pound the pavement
- Newspapers
- Radios
- Chamber of Commerce
- Networking...

NETWORKING

- Friends
- Colleagues
- Agencies
- Psychiatrists
- Other psych
- PCP/MDs
- Physical Therapists/Chiro
- Massage Therapists
- Bartenders
- Fitness Gyms & Nutritionists
- Business Groups
- Networking Events



DEVELOP

A word cloud of positive adjectives centered around the word 'Fun'. The words are arranged in a circular pattern around the central word 'Fun', which is the largest and most prominent. The words include: 'Helpful', 'Interesting', 'Exciting', 'Challenge', 'Unique', 'Passion', 'Growing', 'Inspired', and 'Competent'. The words are in various colors and orientations, creating a dynamic and engaging visual.

Competent
Helpful
Interesting
Exciting
Fun
Inspired
Challenge
Growing
Unique
Passion

CLOSE

- Terminating with Graduating Clients
- Terminating with Unhappy Clients
- Moving your Practice
- Closing your Practice

TROUBLESHOOT

- Competitive Colleagues
- Unethical Behavior/Ethical Complaints
- Firing a Worker
- Dealing with Institutions
- Discharging Problematic Clients
- Failure to Thrive

THE TOP MISTAKES

Revisited

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