Private Practice Start-Up Guide

A practical organizational tool for therapists starting a private practice.

Dr. Lavonne Zwart Schaafsma

DoctorLavonne.com

Rev 9-2019

Introduction

Have you been dreaming about setting up your own practice to gain more freedom in your work, but just need the guidance and encouragement you've been longing for?

Have you ever wished for someone to dig deep with you into your clinical work to gain a fresh perspective?

You are in the right place.

Module 1 Get Started

We will cover all the basics of getting started with your own private practice. These steps can be worked on before you ever leave your current place of employment.

This is the time to dream and prepare.

"You can't stay in your corner of the forest waiting for others to come to you.

You have to go to them sometimes."

– Winnie the Pooh (aka A.A. Milne)

Step 1

Private Practice Vision

Goal: Identify a group of people you enjoy working with, or a therapeutic skill you feel passionate about, and build a mission statement around this group of people or service.

One of the most significant, career-shaping experiences for me came when I worked for an agency located within a Women's Health Center. In that location, I got many of my therapy referrals from an OBGYN practice to work with adult women dealing with issues of depression, anxiety, eating disorders, as well as major life changes.

When it was time to launch my own private practice, I had a solid base of experience to talk to colleagues and referral sources about my experiences working with women, and my vision for guiding them through the unique issues they face. I had found my niche.

I couldn't possibly name all the specialized areas in psychotherapy to choose from.

There are broad categories such as couples, individuals, and children, but each of these could be divided into countless subcategories. Or you might have expertise or interest in specific techniques within psychotherapy.

When you start your own practice, it will be important to define your own specialization and create a mission statement around this niche – one you can pitch to friends and colleagues. Think about the kind of client or the practices you use with clients that give you the most energy.

My consultation practice evolved out of my work with women, specifically female therapists. A growing number of my clients are therapists themselves looking for help in setting up their own practices and desiring on-going consultation.

My mission statement for my consultation practice is:

Empowering therapists to gain freedom and confidence in their work.

Homework Assignment

1. Write your own mission statement.

Helpful Hints

- Who do you most enjoy working with? What areas are you drawn to reading about?
- Do an online search of private practices in your area and see what other therapists are using on their webpages.
- Imagine you have a website. What phrases or words would you like people to see on your homepage?

Step 2

Basic Marketing Plan

Goal: Find effective ways to communicate your service to friends, colleagues, and organizations. Develop a strategy on how to gain referral sources.

When I started my own practice, I had no website. In fact, I had no web presence to speak of. I simply took a few of my colleagues out for coffee and talked to them about what they were doing and what I was doing. That's it. After that, most of my referrals have come from my clients themselves and one specific colleague that I have maintained a close relationship with.

When you start to build your own practice, you will want to consider the following referral ideas.

Website

A website can be a great way to market your practice, but it's not a prerequisite for starting one. And it shouldn't be the barrier that keeps you from making the move. If building a website is fun for you and helps you organize your new business, then by all means, put resources into a website. However, if the thought overwhelms you, or worse, keeps you from taking the step to go out on your own, put it on the back burner and start personal communication or offer a service for free.

Therapist Locator Tool

An intermediate step, if you want to be found on the internet, is to pay for a web presence on a therapist finder website. My own professional organization, APA (American Psychological Association®) has a therapist locator tool. Check with your professional organization. Or if you aren't plugged into a professional organization, you can link yourself to *Psychology Today,* which has a massive therapist locator tool.

Email Communication

My personal preference for marketing is to avoid mass communication. If you want to communicate to others that you are starting your own practice, send individual emails that are personalized with relevant information.

Include an eye-grabbing subject line. Instead of sending a standardized email, think about a personal greeting tailored to the individual that you are sending information to. Begin with a warm greeting and end with a warm goodbye.

Personal Contact

You could meet personally with a select group of contacts by taking them out for coffee or lunch. I recommend asking questions about how you can be of service to them as well as explaining your new practice.

Offer a Free Service to Referral Sources

Choose an area of expertise and offer a free service to potential referral sources. I have a colleague who went to physicians' offices talking about self-care for doctors. He provided this service for free about 20 years ago, yet one of these physicians ended up as his greatest referral source, resulting in hundreds of referrals over his career. Another colleague gave short lectures in churches about strengthening marriages. This too has been a great source of referrals for her. Yet another colleague has travelled to businesses, doctors' offices, and colleges, teaching short sessions on meditation techniques resulting in dozens of referrals for her newly launched therapy business.

Offer a Free Service to People in the Community

At one point in my career I gave parenting classes to people at my church, and another time I spoke at a class for women experiencing postpartum depression. I've written blog posts for my agency's website on women in transition. All for free. Why? I had information I wanted to share, and I was looking for ways to give this information away and, in the process, gain referrals.

Homework Assignment

1. Decide if you will have a web presence or not.
2. Write a practice e-mail explaining your services and have a colleague or friend read it over and give you feedback.
3. List 4-5 contacts that you would like to take out for lunch or coffee.
4. Generate your own ideas of services you could offer for free or cost in order to gain referrals.

Helpful Hints

- What practices have you enjoyed or would like to learn more about?
- Think of places or venues in your city that you could offer a service to.

Step 3

Find Office Space

Goal: Identify your values in terms of office space. Assess different options in terms of those values.

When I left the agency I was working with in a women's health center, I also left behind the ability to walk to work. This was a tough decision because I highly valued being able to walk to work (my husband has walked to work for over 10 years).

However, since my competing values included freedom (owning my own practice) and strong relationships with colleagues, I gave up my walking shoes for a 15-minute commute to my new office in another city close by. It was worth the trade-off.

When choosing my own office space, I had to determine my priorities. After some thought, I realized that my top priority was working with colleagues I admired, and my second priority was having a clean financial arrangement.

I now have 15 colleagues working in an office suite where we share no financial ties other than our lease. I have learned the hard way that having other therapists charging me a percentage of the money I made did not work for me.

Aesthetics and parking were also important to me, but they were more negotiable.

Consider the following aspects of office space.

Put numbers 1 through 6 by each of these statements to indicate their priority to you.

Aesthetic – The look and feel of an office including the view and lighting.

Priority # ______

Convenience for Clients – The location of the office in terms of proximity to nearby highways or a central location in a city, as well as proximity to public transportation. Safety and cost of parking are also considerations.

Priority # ______

Distance from Home – Your commute time and mileage.

Priority # ______

Colleagues – The colleagues you'd like to work with.

Priority # ______

Cost of Rent – The cost of the office and other amenities in the building.

Priority # ______

Office Space – The size of the office you need to accomplish your services, as well as other space to accommodate larger groups of people for specific services such as group therapy or education.

Priority # ______

Homework Assignment

1. Contact colleagues and/or a commercial real estate agent in order to start looking at office spaces for your new business. Use the prioritization list above to help communicate your values to a real estate agent.
2. Identify the different prices for rent in the area you live in.

Helpful Hints

- Talk to a friend or colleague to see if your prioritization list matches their perception of you. This may lead to helpful dialogue in making your decision about office space.

Step 4

Make Your Business Official

Goal: Choose a business name and file paperwork to make your business official.

My very uncreative name for my business is Lavonne Zwart Schaafsma, LLC. What it lacks in creativity, it makes up for in practicality. You will need to choose your own name for your new business.

Once I had chosen a name for my business, I hired an accountant to help me with the paperwork to start my own LLC. I've had colleagues who have used a lawyer to go through the same process, but for a much heftier fee.

I recommend that you enlist the help of an accountant or lawyer with the process of starting a business. This is an opportunity for you to connect with the members of your "team" who will help you in your new business. The professional you work with will request a Tax ID number from the IRS and use this number to help you launch your business.

My accountant also advised me to keep track of *all* the money I spent on my new business and to document them along with receipts.

All your costs in starting a business are tax deductible (including this workbook and any services you pay me). When I started my new office, I saved all the receipts for the furniture I purchased, my computer and printer, office supplies, and of course rent. My accountant then helped me categorize these expenses for tax purposes.

Once you have your Tax ID, you can also set up a business bank account, as well as print business cards to give to colleagues and referral sources.

Homework Assignment

1. Find a professional to help you set up your business.
2. Choose your favorite bank and set up a business bank account. I suggest finding a bank with the capability to connect electronically to an online accounting system such as QuickBooks.
3. Create a business card with your new business name.

Helpful Hints

- When looking for a professional to help you set up your business, a bank, and business cards ask your friends and colleagues for recommendations. All of these can be accomplished cost effectively if you take the time to consider your options.

Module 2 Money

As a savvy businessperson, you will want the most efficient uses of your time in terms of the money you make.

In other words, you want to spend more time providing services where you get paid, than on the systems you use to track your money.

Get accounting in order.

"Money carries our intention. If we use it with integrity, then it carries integrity forward. Know the flow – take responsibility for the way your money moves in the world. Let your soul inform your money and your money express your soul."

– Lynne Twist,
The Soul of Money: Reclaiming the Wealth of Our Inner Resources

Step 5

Payment

Goal: Set a rate and take payment for your services.

When I started my fee for service practice, I felt somewhat uncomfortable charging my clients my full fee when I didn't accept insurance. The more I hesitated or apologized, the more uncomfortable my clients became (some were even offended when I proposed I had a sliding scale). But when I stopped apologizing and owned my rate as the cumulation of my experience, years of schooling, and 20 yearlong commitment to ongoing supervision and consultation, my clients also seemed to feel more comfortable with my rate as well.

The rate you choose for a therapy session should include the following considerations.

- Years of experience
- The going rate in your area
- Whether you will offer a sliding scale

You will need to do some research on finding out the fees in your area by asking colleagues and searching online. This will allow you to come up with an average fee that therapists with similar qualifications and years of practice charge.

You will then need to list your rate in the practice policies that you provide to clients at the beginning of treatment. Ethically, if you decide to offer a lower rate to some of your clients, all your clients have the right to know that you are doing so. This can be accomplished by a simple line in your policy paperwork.

This is my statement about payment:

The fee for an outpatient psychotherapy session (45-50 minutes) is $150. If under financial duress, this fee can be reevaluated at the discretion of the therapist to include a sliding scale with a minimum payment of $100.

Finally, you will also have to choose which methods of payment you will take (e.g. cash, credit cards and/or checks). For the first year of owning my own business, I used a third-party biller through an encrypted website. That worked fine at first, but then the fees started going up to the point that I was compelled to find a new system.

I now use my Electronic Health Record to receive payment. Thankfully my EHR has an integrated payment system with a reasonable built in fee that makes it easy to bill my clients who want to use their credit cards. Of course, I also take checks and cash.

Homework Assignment

1. Set a rate and determine a system of payment.

Helpful Hints

- After you determine your rate, check with a colleague or friend to see if this rate matches their perception of the rate you might charge.

Step 6

Fee-for-Service or Insurance Paneling

Goal: Make the decision to have a fee-for-service practice, be paneled by insurance companies, or a combination of both. Learn how to produce a "superbill" for clients.

When I worked in an agency, I was on several panels for insurance companies. That means that my client was responsible for the copay for mental health sessions, but my company billed their insurance companies to collect the balance. This system was convenient for my clients, but in many ways, it was inconvenient for me. I spent countless hours on paperwork justifying additional sessions, the insurance companies often delayed payments, and worst of all, they set my therapy rate.

After starting a fee-for-service practice, I have found that I'm more in charge of the treatment of my clients.

Together we decide on the length of treatment – as opposed to being dictated by an insurance company. I save countless hours on paperwork, and I get to set my own rate.

Just to be clear, a percentage of my clients *do* use their insurance for therapy. These clients are fortunate to have an "out-of-network" mental health benefit. However, instead of me spending time billing their insurance, I provide all the codes they need to bill their own insurance company, and my clients get reimbursed directly from that company, while paying me at the time of service. I provide all my potential clients with a document of questions to ask their insurance company before starting therapy with me. This helps them determine whether they have out-of-network benefits.

Because my practice is fee-for-service, I provide each of my clients with a monthly superbill which is essentially an invoice with all the relevant codes my clients need to bill their own insurance companies.

My EHR (see Step 9) has made this extremely easy because the system produces a superbill for me. I just plugged in my information when I set up my account.

The information needed for a superbill:

- Your name and/or logo
- Your Tax ID number
- Your License Number
- Your NPI (National Provider Identifier) - This may be optional in your state and might be important for your clients who want to get reimbursement from their insurance companies. You may already have an NPI number if you are working for an agency. You should ask the agency you are working for.
- Diagnosis
- CPT code with description
- Price of service and payment of service

Example of a Superbill

Lavonne Zwart Schaafsma, Psy. D.
983 Spaulding Ave. SE
Ada, MI 49301
MI License #:

STATEMENT FOR INSURANCE REIMBURSEMENT

Katniss Everdeen
District Twelve
Earth 12345

Statement Issue Date: July 1, 70 ADD

Client:
Katniss Everdeen
(123) 456-7890

Everdeen.Katniss@gmail.com

DOB: May 8, 58 ADD

Provider:
Lavonne Zwart Schaafsma, Psy. D.
(616) 710-1345
doctorlavonneconsultation@gmail.com

Tax ID:
NPI:

Diagnosis Code: F00.0 Dystopian Trauma

Date	Service	Description	Fee	Paid
6/1/70	90834	Psychotherapy, 45 min	$150	$150
6/8/70	90834	Psychotherapy, 45 min	$150	$150
6/15/70	90834	Psychotherapy, 45 min	$150	$150

Total Charges $450
Total Paid $450

Make payments to Katniss Everdeen

Although I have recommended a fee-for-service practice, I realize that this is not always possible. If you are compelled to take your client's insurance, you will need to be paneled with insurance companies and you will need to find a system of billing with these insurance companies.

Homework Assignment

1. Make the decision to try a fee-for-service practice or pursue paneling with insurance companies.
2. If you decide on a fee-for-service practice, learn how to create a superbill.

Helpful Hints

- If you are paneled now and decide to go off the panel, make sure you have guidance in contacting each insurance company you are currently paneled with so that you are released from the terms of your agreement with them. This is an important step for your clients to have the option to submit to insurance with you as an "out-of-network" provider.

Step 7

Accounting

Goal: Learn the important elements for keeping a financial account of your practice.

After psychology, my second choice for a career would have been accounting. I love to work with numbers, I love balance sheets, calculations and reports. I realize that this is not necessarily common for therapists. For some, accounting is the scariest element of setting up a private practice. Truthfully, though, it doesn't need to be scary. The greatest hurdle is learning a system and setting it up, but once you've done so, an efficient system will save you time and money.

Accounting systems are a matter of personal preference. I use an online accounting system through QuickBooks®, currently paying $40 per month for my package. However, there are many accounting systems out there, some of them even free.

Initially, I had to invest some time to learn the system and set it up (count on a solid 4-8 hours), but since then it has saved me countless hours. I can easily print monthly and year-end reports to help me when tax time comes. In fact, QuickBooks® tracks all my income and liabilities for tax purposes.

I learned the system on my own (with free phone support), but last year I paid a QuickBooks® consultant for two hours of her time to show me some of the nuances of the system. I wish I had done this up front. It has made things even more clear and easy.

There are less expensive options, but these come with a trade-off. I have a colleague who uses Excel® and finds that system easy to use; however, at tax time she cannot easily produce the reports that I can. On the other end of the spectrum, I have colleagues who have a billing service to help them with their financials.

Paying for an online accounting system keeps overhead low and simplifies the billing process. Keep in mind, though, that I have a fee-for-service practice, so I *do not* interact with insurance companies, and therefore I don't have a complex billing process.

Homework Assignment

1. Choose an accounting system.

Helpful Hints

- Ask your accountant if they have a preferred system.
- Use the system you are already familiar with.
- Find a system that will save you time and money.

Step 8

Liability Insurance

Goal: Find insurance coverage that makes sense for you and your practice.

You cannot start seeing clients without your own liability insurance. I found my liability insurance company through the professional organization I belong to (American Psychological Association® or APA). One of the greatest perks of my insurance is the free legal advice they provide. I've used that perk over the years to talk through some difficult ethical situations in my practice. It has been invaluable.

If you belong to a professional organization, see who they recommend. If not, ask your colleagues. I suggest getting the maximum limits on your liability insurance.

I also recommend getting a personal umbrella policy. This will provide you with even more coverage than a usual policy because it has a higher limit and encompasses more than just home and auto. In other words, it will protect you from unforeseeable circumstances that are out of your control. For example, if your client slips on the ice on the walkway to your office you want additional insurance coverage to help you through a difficult situation.

Homework Assignment

1. Select an insurance company to work with. Set up liability insurance.

Helpful Hints

- Ask colleagues who they use.
- Contact at least 3 companies to price compare and to see what benefits they include in their liability coverage.

Module 3 Set Up Systems

Owning your own private practice involves clear and relevant record keeping with forms and policies that are easily accessible to clients.

Think efficiency.

"Remember if you don't prioritize your life, someone else will."

– Greg McKeown,
Essentialism: The Disciplined Pursuit of Less

Step 9

Record Keeping

Goal: Find a system that is understandable, ethical, and comprehensive, while saving the most time and effort.

When I started private practice, I used paper forms for my paper files. The agency I worked with provided these forms for me. When I started my own business, I adapted these forms to fit my needs (however, I was still working with paper forms and paper files).

Recently, I decided to make the switch to an Electronic Health Record (EHR). I wanted to have a system that would house all my documents, my progress notes, dates of services, invoices, and a billing system for credit card transactions. I also wanted a HIPAA compliant telehealth option that I could use for consultation services.

Amazingly, my EHR was able to do all these things in one system. Combined with Quickbooks®, I have an all-encompassing, efficient system that saves me valuable time and energy.

If you are just starting your practice, I strongly recommend beginning with an Electronic Health Record. One of my favorite aspects of my EHR is that it includes all the forms I need for my private practice. I just had to personalize them.

The EHR I use is called Simple Practice but there are several other electronic health records tailored specifically for therapists.

If you have a reason for not using an EHR, I recommend you contact me for a consultation so that I can walk you through the documents you will need.

Homework Assignment

1. Start an EHR.

Helpful Hint

- My EHR, Simple Practice has a 30-day free trial. Let me know if you want this option and I'll send you a link.

Step 10

Forms and Policies

Goal: Make sure that your client documents meet the ethical and legal guidelines for the state you live in.

When I started in private practice, I spent hours creating documents for my clients on my computer. I would then print out these documents and have my clients fill out the forms, or I would handwrite my treatment plans and progress notes. Since having an electronic record, I've been able to adapt the EHR's standard forms to my specific practice. This has saved me countless hours. I used to send clients home with a lengthy intake form that they had to fill out by hand. Now my clients fill out an online intake form that I send them before the first session. This saves us both time and effort.

After recently attending an ethics seminar, I asked the lawyer giving the presentation if it was necessary to review my forms with a lawyer. Her answer was that it was unnecessary since there is a proliferation of templates on the web.

These are the forms commonly used in private practice:

Before meeting with a client:

- Demographic Information
- Therapy Practice Policy
- Privacy Policy
- Informed Consent for Treatment
- New Client Intake Form (client fills out) – I also use this form as my initial assessment. I go over this form with the client and ask additional questions as I formulate my diagnosis of the patient's needs.

After meeting with a client:

- Release of Information (if necessary)
- Diagnosis and Treatment Plan
- Progress Note Form
- Case Closing Form

You will be required to keep a medical record for each client. At minimum this record must include a patient assessment, a treatment plan, the reason for treatment, an account of tests and exams given to clients, and any observations (or progress notes).

In Michigan, I'm required to keep these records for seven years after seeing an adult patient. For clients younger than eighteen years, it's seven years from the time the patient turns eighteen.

Ethically, it's also vitally important that when you end therapy with a client and close the client's file, you have a documented record of that case closing.

Homework Assignment

1. Choose a record keeping system that is compliant with legal and ethical procedures.

Helpful Hint

- If you would like a copy of my forms, please send me an email request, and I'll send them to you. My email is doctorlavonneconsulation@gmail.com.

Step 11

Communication Practices

Goal: For email, text and voicemail, find and implement a HIPPA-compliant communication method to use with clients.

When I started working in a solo practice, I had never heard of therapists using an electronic health record with a client portal for communication. For this reason, when I first started my practice, I used a free phone and email service; however, neither of these services were HIPAA compliant.

Since then, I've changed to a secure voice and messaging service to prioritize my clients' privacy.

If you want to use a phone and email service, you will need to do some research in order to ensure you are using a HIPAA compliant communication system. This involves getting a BAA (Business Associate Agreement) from the company you are using these services from. This agreement is the company's pledge that communication is private.

Even if you do have these agreements, there may still be limitations surrounding privacy through email and texting. For this reason, I give a disclosure in my practice policies around those types of communication:

I cannot ensure the confidentiality of any form of communication through electronic media, including email and text messages. If you prefer to communicate via email or text messaging for issues regarding scheduling or cancellations, I will assume you have given me permission to communicate back to you in this way. If you have any hesitation using text messaging or email, please know that you can communicate with me via the Simple Practice Client Portal Messaging System, which is the most secure and private way to reach me. While I try to return messages in a timely manner, I cannot guarantee you an immediate response and therefore request that you do not use these methods of communication to discuss therapeutic content and/or request assistance for emergencies.

If I had started out with an EHR, I would have conducted all my communication (except phone calls) with my clients this way.

If you are just starting your own practice, I recommend starting by using an EHR for communication for everything but phone calls. I would also recommend getting a business phone line that is HIPAA compliant.

Some companies will provide a phone number through an app on your existing phone that will issue a BAA. Doing just a little research on the internet should help you find a service you are comfortable with.

Homework Assignment

1. Choose a communication system that will work best for you, while considering privacy issues.

Helpful Hint

- It's easier to start out with these systems than try to change them later.

Module 4 Sustainability Plan

Now that you've succeeded in establishing the nuts and bolts of a practice, make sure it is sustainable.

Think long-term.

"If I am not for myself, who will be for me?
But if I am only for myself, who am I?
If not now, when?"

– Rabbi Hillel

Step 12

Tracking and Thanking Referrals

Goal: Come up with a system to track and thank referral sources.

I have made it a point to return calls and emails to all potential referrals. I have been surprised at how often potential clients expressed gratefulness for my responsiveness. In fact, I have been told by clients that most of the therapists they call do not return their phone calls. I consider this service part of my role as a therapist.

Personal Responsiveness

If a potential referral contacts me but for some reason we are not a fit, I take the time to help this person find a therapist who is a good fit. For example, if a referral requires a therapist who is paneled with insurance companies, even though I cannot serve her, I talk through other options with her. I believe this kind of diligence is not only good for my business but for therapy in general.

If you are thinking, "*But I'm swamped with referrals. There is no way I could respond personally to each!*", my response is What are you waiting for? Start your own business now!

Tracking Referrals

I recommend tracking referral sources so that you know where your referrals are coming from. Are they coming from your own clients, from colleagues, or from an institution or organization that you have personally marketed to? Keep this running list documented, making sure to keep client names and information confidential.

Once you have this information, you can redirect your efforts to thanking these sources. Some of the ways I have thanked colleagues for referrals include taking them out for coffee or lunch, sending a thank-you card by mail, or thanking them with a phone message or email. I don't mention the referral by name (unless I have a release), but I do take the time to acknowledge the folks that are sending clients my way.

This is the most recent example of a referral I received:

Date of Contact:	Referral:	Referral Source:	Date of Return Contact:	Method of acknowledging referral:	Outcome:
7/15/2019	CVB	Eliza Goldstein (therapist)	7/19/19	Email	Scheduled an appt for September

Homework Assignment

1. Use a table or chart to create your own system of tracking referrals.

Helpful Hint

- Use initials instead of names for client privacy.

Step 13

Ongoing Clinical Consultation

Goal: Develop a plan for ongoing case consultation and personal growth as a therapist.

When I worked in an agency, we had case consultation once or twice a month, during which we brought cases that we wanted feedback on. This kind of consultation was entirely focused on therapeutic strategies and it was only somewhat helpful to me. Later, when I shifted to a consultation model that focused not only on strategies for therapy but also on my own reactions, biases, opinions, and feelings, I started to grow and change as a therapist. This practice provided me with an in-depth look at my own person in therapy, and the ways that I was relating to my clients.

I truly believe that if we want to stay relevant in this profession, we need to commit to ongoing clinical consultation.

For example, I meet with a senior experienced therapist once a week for fifty minutes to talk through specific cases and examine other issues in my personal life that affect my role as a therapist. I pay this professional an hourly rate. I also attend a supervision/consultation group for ninety minutes a week. This group is led by two senior level therapists and includes six other therapists. We talk through cases as well as personal issues related to our roles. We all pay a group rate for this service. I also regularly exchange time with a colleague to discuss cases and my role as a therapist.

In a recent article by Melhim Restum, he states that the supervision/apprenticeship model of learning is a natural fit for building a mental health practice. I call this model “clinical consultation.” I suggest pursuing this kind of consultation not as a prerequisite for getting a license but for the sake of growing as a therapist. It is fully voluntary and will help you grow in case formulation and self-awareness.

As Restum states, “Supervisors and mentors have been our most valuable learning resource throughout history. The supervision/apprenticeship model has been used in virtually every profession including art, science, medicine, psychology, and sports.”

Click here to read the full article.

Homework Assignment

1. Find options in your area for ongoing clinical consultation either by paying a professional or exchanging time with a colleague.

Helpful Hints

- Take the time to find a professional that you align with. If this relationship is not a good fit, continue searching for someone who is. This relationship could be ongoing over years and you want to find someone for the long term.
- Find other therapists who are looking for quality supervision and approach a professional in your area who might be willing to lead a group.

Step 14

Self-Care Plan

Goal: Make a solid plan to maintain a healthy private-practice lifestyle.

For many years of my career I did not maintain a healthy balance between work and home. It took me years to sort out the optimal number of clients to see in a day, what time to see these clients, and how much room to leave between appointments.

Now I manage my practice so that I see between five and eight clients per day, and I work early mornings to early afternoon, knowing that these are my most energetic hours. I work three days at my office, and I have four days at home to manage household tasks. This schedule works well for me and allows me to optimally care for myself and my clients.

If you've chosen the profession of therapy, I sincerely hope that most of the time you are energized by your work; however, I know from experience that there are times when this profession can be quite draining and that the potential for burnout is high.

Here are some considerations for self-care when setting up your practice:

- Find the optimal time to see clients in your day.
- Determine the number of clients you want to see in one day.
- Decide how many days a week to work.
- Come up with strategies to stop and start your sessions on time.
- Create margins in your workday.
- Identify the population(s) that gives you the most energy.
- Identify the population(s) you don't feel equipped to see.
- Understand an ethical termination policy.
- Know which kinds of activities feed you away from the therapy office and learn to implement these into your life.
- Consider the importance of exercise, sleep, and eating well.
- Keep strong and healthy relationships outside the office.

Homework Assignment

1. Reflect on each of these statements either through a personal journal, through a discussion with a colleague, or through consultation in which you pay a professional to help guide you.

Helpful Hint

- If you would like guidance with any of the above considerations or anything else in this workbook you can contact me at DoctorLavonne.com and schedule a personal consultation.