

## PRACTICE SETUP

# Private practice and telepsychiatry startup checklist

An educational checklist of the pieces clinicians commonly line up when starting an independent or telepsychiatry practice. Not legal, tax, or compliance advice.

**Educational example only.** This is not legal, medical, or compliance advice, and it is not a ready-to-use legal document. Requirements vary by state, payer, and setting. Adapt anything like this to your own situation and have it reviewed by qualified legal and compliance counsel licensed in your jurisdiction before using it in a practice. You are responsible for compliance with all applicable federal and state laws, including HIPAA. shrinkiatry publishes professional commentary and education, not legal or medical advice.

*Current as of July 7, 2026. Laws, payer rules, and billing codes change. Confirm the current requirements for your jurisdiction and setting before you rely on anything here.*

## Identity and credentials

- NPI (Type 1, and Type 2 if you form an entity)
- Active state license everywhere your patients are physically located; consider the IMLC for physicians or the nurse compacts for NPs
- DEA registration, and state controlled-substance registration where required
- Board certification and CV or CAQH profile kept current

## Business and money

- Business entity and EIN, set up with an accountant and attorney
- Malpractice coverage, including tail coverage where relevant
- Payer enrollment and contracting, or a clear cash-pay structure and fee schedule
- Bookkeeping, billing workflow, and a plan for taxes and retirement

## Systems and compliance

- An EHR and a HIPAA-compliant telehealth platform, with signed business associate agreements
- Written privacy practices, consents, and financial policy
- Secure records, backups, and a breach-response plan
- A crisis and coverage plan for after hours

## Getting seen

- A simple, honest website and a referral plan
- Clear scheduling, no-show policy, and intake workflow
- A realistic ramp: cash and employed panels fill at different speeds

shrinkiatry is the profession layer of The Shrink Network. Reviewed by Shariq Refai, MD, MBA, FAPA, a board-certified psychiatrist. More educational resources at [shrinkiatry.com/resources/](https://shrinkiatry.com/resources/).