

Leslie S. Tsukroff, Inc.
Business Management For Mental Health Practitioners
68 North Bridge Street
Somerville, New Jersey 08876
973-879-1678
LTsukroffLCSW@Hushmail.com
www.LeslieTsukroff.com

Needs Assessment

Name: _____

Business Address: _____

Phone # _____ E-mail _____

Website _____ On-line profile _____

How did you hear about Leslie S. Tsukroff, Inc? _____

Leslie S. Tsukroff, Inc. tailors its consultation sessions to each client. Therefore, in order to meet your needs, it is important to know more about you, your practice and your goals. Please complete and along with your resume and **scan and e-mail to LsTsukroff@aol.com**.

Section 1 (Please answer questions about your current private practice).

Is your practice PT or FT? _____. How many years? _____ How many hours per week? _____

If you are employed outside of private practice, where are you employed _____

What are your responsibilities _____

Are you an LCSW, LPC, PhD, PsyD? _____

Year received Licensure? _____

What state (s) are you licensed in? _____

If you are provisionally licensed (under supervision – LAC, LSW) when do you expect to receive your license to practice independently? _____

What percentage of your clients are? Children ____ Adults ____ Adolescents ____ Couples ____

Families ____ Groups ____

Do you specialize in any area of practice? Explain

Do you hold any certifications in a specialty area? Explain

What are your areas of clinical expertise? Explain

What are your clinical strengths?

What are your clinical challenges?

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What are your business strengths? _____

What are your business weaknesses? _____

Why did you decide to start this practice? What does this mean to you?

Who is your "dream client"? _____

Where do you see your practice in 2 years? _____

In 5 years? _____

What are your current ideas/plans around hiring: other clinicians/ Billing specialist? Secretary?
Receptionist?

Section 2 (please complete if you are employed in an agency or organization. If not, please skip to section 3)

Please explain in detail, your job responsibilities. Make note of: client population; client issues; modalities used; supervision (given/received); administrative tasks. What do/don't you like about your current job responsibilities?

Section 3

What prompted you to seek business management consulting? _____

What do you hope to gain from your consultation experience? _____

What is your biggest concern regarding your business (or starting a business)?

Section 4

Please indicate the consulting services you are interested in. Please be specific when completing "Other".

Getting Started

___ Business finances

___ Malpractice/professional liability insurance

___ Cyber protection

___ General liability insurance

___ NPI

___ Tax Id#

___ CAQH

___ Credentialing

___ Finding and choosing office space (do I need an office?)

___ Budgeting

___ Clinical supervision/consultation (Do I need this and how do I find someone?)

Questions _____

Traditional Business Practices

- ____ Develop a Business plan
- ____ Define Business goals
- ____ Planning a budget- short and long term
- ____ Choosing a Business Structure – LLC, Corp, Sole Proprietor

Questions _____

Fee setting/ Reimbursement Options/Managed Care/Insurance

- ____ How do I decide what to charge for the services I provide?
- ____ What are the going rates?
- ____ How do I approach the subject of fees and payment with my clients?
- ____ How does managed care work?
- ____ Should I sign up for managed care panels?
- ____ Insurance related concerns
- ____ Should I submit insurance claims for my clients?
- ____ Can I survive without accepting insurance or managed care?
- ____ Should I offer a sliding scale? How do I legally and ethically offer a sliding scale?
- ____ other services- observations, court visits, documents etc.

Questions _____

Marketing Strategies

- ____ Develop a marketing plan
- ____ Networking
- ____ Niche development
- ____ Practice specialties

- _____ How do you connect with referral sources?
- _____ How do you foster long-lasting business connections outside of current relationships?
- _____ Creating marketing materials
- _____ Should you advertise?
- _____ where?
- _____ How?
- _____ Getting the most for your advertising \$

Questions _____

HIPAA Compliance

- _____ What does this mean and does it apply to the practice?
- _____ What takes precedence, HIPAA or state laws?

Questions _____

Documentation/Record Keeping

- _____ How does agency work differ from private practice?
- _____ What needs to be included in an outpatient treatment record?
- _____ How will you ensure record-keeping and documentation compliance?
- _____ How do I know if my records are in compliance with State Law, my Professional Code of Ethics and HIPAA)?
- _____ Creation/review of clinical case record forms
- _____ How do I write a progress note that will pass an insurance company audit and fulfill my ethical and legal responsibilities?
- _____ How do I write a treatment plan that will pass an insurance company audit and fulfill my ethical and legal responsibilities?
- _____ Help with DSM 5-TR
- _____ Help with ICD-10
- _____ Help with understanding CPT codes and how to use them
- _____ Help with understanding Place of Service Codes
- _____ Understanding 21st Century Cures Act and release of records
- _____ What is a GFE and does it apply to me?

Questions _____

Technology options

____ Practice management system Vs. Electronic Health Record—should I invest?

____ What is the difference between practice management software programs?

____ HIPAA secure E-mail, Text, Payment platforms, E-fax

Questions _____

Billing Options

____ Should you hire an outside source to handle all billing?

____ Does it make sense to purchase a billing program? (PMS/EHR)

____ What needs to be on the bill/invoice given to clients? Superbill

____ How do I complete a CMS-1500 form?

Questions _____

Telehealth/Telemedicine

____ The basics

____ NJ Law, NJ Regulatory Law, Ethics Code, Federal Law

____ Coverage

____ Consents

____ Risks/benefits

Questions _____

Questions, comments? Please be specific.

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Please do not forget to attach your resume.

I look forward to working with you,

Leslie