

For this issue, we learned of an interview that NJAMFT Northern Chapter member, Jose Perez had with visiting NY AAMFT PCF member, Erica James. We invited Erica and Jose to allow us to share the interview.



Erica James PCF
NY AAMFT

Erica writes: My name is Erica James and I am a Seton Hall MFT graduate. I am currently a therapist at New York Psychotherapy & Counseling Center. During graduate school, I noticed that we are taught to be clinicians, *but not how to make therapy a business*. As a student, I really admired and respected Dr. Jose Perez as both a clinician and business person. I wanted input and advice from someone who was running a successful private practice and that led me to think of Dr. Perez.

Erica: What would you consider your biggest challenge in private practice and how did you handle it?

Jose: [I think] probably finding an adequate office space that was affordable, met my needs and was in a good location. I began by subletting a few days a week in the town that I wanted to work in and slowly started looking for spaces (once I filled those days) in that area until I eventually found one that I loved. This was difficult because I wound up spending more than I wanted to but in the long run, it turned out to be perfect. The fear of not being able to afford the rent each month was not realistic as I learned shortly after. I also saved enough prior to have a few months as cushion just in case! I've been in the same space now for 7 years and haven't looked back! Remember, you can always sublet to others at first if you don't think you can fill a full week early on.

E: What did you wish you knew before entering the field?

J: How to market myself better. From intake forms to advertising to creating business cards and most importantly, creating a website! This is all part of "branding" that I personally did not consider at first but is so important. Have a specialty! Don't brand yourself as "the all in one" type of therapist but also keep it general enough so that you don't exclude others. For instance, my specialty is couples work and I also do a lot of work with LGBT. However, I am also careful about excluding opposite sex couples and so my website is general enough to attract heterosexual couples and yet also same sex. The same applies for Spanish speakers. Think of a good name for your practice. Create a logo and use this consistently on your website, your business cards, your stationary, etc. Have someone (a friend) with a marketing/design background help you!



Jose Perez MA, LMFT

To read the remainder of Erica's interview with Jose Perez, please click on the following link:

E: What are some current challenges?

J: Not taking on more than I can handle. I have a very successful practice and sometimes, I have to decline new clients, which is hard to do (for me), especially if they come referred from a colleague. I do not want to give the impression that I am always full (although I am mostly) to colleagues who may just decide not to refer in the future. Don't get burned out. Seek supervision when needed and create a peer group if possible to talk about clients with colleagues. I have been in the same peer group for 9 years and met these folks at the agency where I worked and did my internship. They are friends and I am very comfortable bringing my cases to them any time I need feedback!

E: Are you on any insurance panels?

J: I am paneled with one insurance company. When I first started, I was in about three and chose to stay

with just one. I find that one is a comfortable number and I try to book these clients during the day time hours (less desirable times) and leave out of network for evenings and more desirable times. I am also able to serve populations that may not be able to afford full fee and therefore only can afford to pay a co-pay amount.

E: What is the process like to get on insurance panels?

J: The process takes about 3 months. Once you are licensed, you should get on the Council for Affordable Quality Healthcare (CAQH), a leader in creating shared initiatives to streamline the business of healthcare. The profile takes a couple of hours to complete and needs to be updated (re-certified) every six months to ensure that you are maintaining the proper qualifications. Insurance companies have access to it as well so they can see you are meeting all the standards for practicing in your state (liability insurance, state license, etc.). Each insurance company has an application that takes about 3 months to approve so give yourself plenty of time to apply. Panels may not accept you if they are saturated in the area that you are applying for. If you happen to be bilingual, that should help you get approved.

E: How do you handle fees?

J: I go with the market rate in my area. Ask around and find out what other colleagues are charging or look on their website. I also work on a sliding scale, depending on when the person can come in, whether they have insurance or not and what they can afford. Come up with the lowest number you are comfortable with and make that your lowest fee. Stick to that! You don't want to become resentful going forward or have to have an awkward conversation on raising your rate to a client after working with them for a while.

E: How soon after graduating did you enter private practice?

J: It took me a while to get licensed after graduation so I worked in an agency and made minimum pay while I still maintained my full time job. I was fortunate to have a career at the time and shortly before I gained all my hours, was offered a buy-out by the company I worked for (I had been there 24 years and they were downsizing) so I got a full year's severance and was able to take my time, study for the exam and eventually, begin my practice.

E: How did you advertise and market yourself to clients?

J: Psychology Today (the magazine) is a pretty common place to advertise. I also advertise on other sites like www.networktherapy.com and some LGBT sites that focus more on my specialty. Look at where others are advertising and follow suit!

E: How soon after opening your practice did you have a full case load?

J: Probably about 6 months after. Think of this as a business! Invest in helping it grow. Give free talks if you can at local churches or libraries. Reach out to doctors in your area or other professionals (mediators, family doctors, etc.). Send out cards announcing your practice. List it on Facebook! Become involved in (or form) a List Serve with other clinicians catering to your area and and create a network for referrals!

E: Initially, did you take any client that came in or only the ones that fit into your niche?

J: I took anyone that called as long as it met the scope of my competency. Obviously, for ethical reasons, I wouldn't take such things as eating disorders or other presenting problems that I did not feel competent to handle. But this gave me an opportunity to refer out and create a relationship with other clinicians who then reciprocated.

E: Do you use a specific program or software for note writing or treatment plans?

J: No. I created my own form that I use and I got some feedback from other clinicians.

E: Do you have other therapists working with/under you?

J: Yes, I have two associates

E: When did you decide that it was time for expansion or that the practice was growing past just you?

J: After a few years in practice and once I received some supervision training, I decided to expand my practice. I was getting more referrals than what I could accommodate and thought it would be a good idea

to expand. I am very particular as to who I choose because these individuals are a reflection of my own work. I make sure they have a common interest in our work and are looking for supervision. I offer free supervision to my associates and pay them a percentage of what they bring in. I also schedule their clients.

Editor's Note: To sum up this interview, following Dr. Perez's advice, PCFs might begin scouring for new space in the geographical area of your choice, develop a business plan that details your specialty areas of interest, pricing plans, target insurance panels, join the Council for Affordable Quality Healthcare (CAQH) and begin your marketing plan. The marketing plan should include target audiences, community networking, advertising venues and costs and be certain you are able to sustain yourself while you are working on the business.