

Transitioning to Exclusively Virtual

Work through this checklist as you make the move

Work through each item as you make the move to virtual:

YOUR TRANSITION CHECKLIST

Going Virtual: Your Action List



If you take insurance, get clear on how/what/if they reimburse. Code properly.



Use a really great virtual platform that's reliable. Upgrade your internet if needed.



Get your lighting & set up dialed in.



Tell your current clients. Have referrals ready in case in person is important to them.



Get a physical address you can use for insurance & client communications so you don't have to use your home address.



Take your old address off all marketing materials.



Be clear about the state(s) that you serve on your marketing materials.



Continue marketing in whatever way served you before.



Remember that virtual therapy is commonplace now. Tons of us are doing it.