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Your behavioral health practice consultants

Professional Wills

Jeff Zimmerman, Ph.D., ABPP

Just because we are mental health professionals, we are not immune from experiencing life's trials, tribulations, and indeed the very ending of life. So what happens to our practices, our patients, our records, and our professional obligations if we become incapacitated or die?

Because of our obligations, we should develop what has been termed a "Professional Will" or "Practice Emergency Plan." This delineates how you want your practice affairs handled in case of disability or death.

Your Professional Will Should, at Minimum, Include the Following Sections

- Who takes charge and executes your Professional Will?

- Who serves as a backup to your Executor?

- Procedures for the Executor to access the following:
    - Your office, voicemail, and computer(s)
    - Your appointment calendar
    - Client records and contact information
    - Avenues of communication for clients and colleagues
    - Informed consent information
    - Your practice banking and financial accounts (e.g., merchant accounts, credit card accounts, payment processors, etc.)
    - Your current financial obligations (e.g., office lease, loans, equipment rental, website, and EHR platform subscriptions, etc.)
    - Professional liability coverage information
    - Accounts payable software and records
    - Your accountant and attorney(s)
    - Billing records, procedures, and instructions

- Wishes you have with respect to notifying clients and colleagues, and responsibility for the clinical disposition of cases.

Be cautious about using templates. They might not best fit your practice or state regulations. Rather, have an attorney in your state review your Professional Will to make sure it complies with state statutes and regulations.

Be sure to make copies of the document, and of course provide one to your intended Executor. Periodically review and update the document.

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