



# Developing a Resource Guide for the Texas Occupational Therapy Entrepreneur

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## Introduction & Background

In recent years, there has been a rise in the number of private practices owned by occupational therapy practitioners (OTPs). With the increase in occupational therapy (OT)-owned private practices comes the discrepancy between a clinician's administrative knowledge and the demands of providing skilled care to clients in need. Clinicians in private practice must become proficient in administrative skills that are not included in OT clinical training. These administrative tasks include but are not limited to registering with insurance companies, filing insurance claims, marketing, ensuring the practice follows current state guidelines and regulations, staffing, financial planning, and maintaining HIPAA compliance and OT practice guidelines. The capstone project specializes in the area of administration with a focus on private practice. The purpose of the project was to collaborate with an OT private practice owner located in Texas to assist with understanding and meeting the needs of OTPs in the startup phase of opening their own OT small business. The project acts as a "starting point" to streamline useful, evidence-based information on the startup process via a resource guide. Insights and resources contributed to the project were provided by the capstone experience, a needs assessment, the literature, and survey responses from Texas OT private practice owners across Texas. This guide provides state and OT-specific resources to be utilized by Texas private OT practice owners, and overall aims to address challenges commonly faced among the Texas OT entrepreneurship community.

## The Project

My capstone project focused on the administrative demands of owning and managing an OT-specific private practice. Ultimately, my capstone project aimed to create a resource guide for OTPs in the planning phase of starting their private practice. I collaborated with my capstone site, Lifestyle Transitions, to facilitate my knowledge of private practice OT consults, treatment sessions, administrative tasks, financial tasks, marketing methods, and client retention methods performed by my site mentor. By exploring the administrative and therapeutic duties required of an OT private practitioner, I acquired the knowledge needed to develop this resource guide. Under the guidance of my site mentor, the guide was developed as a resource for those interested in managing their own practice.



## Capstone Plan

**Capstone Project Goal 1:** I will demonstrate knowledge and understanding of the day-to-day operations of private practice (Objectives 1-5).

**Capstone Project Goal 2:** By the end of the capstone experience, I will have co-authored a guide for the planning phase of starting a private practice that is peer-reviewed by 3 outside private practice owners (Objectives 1-8).

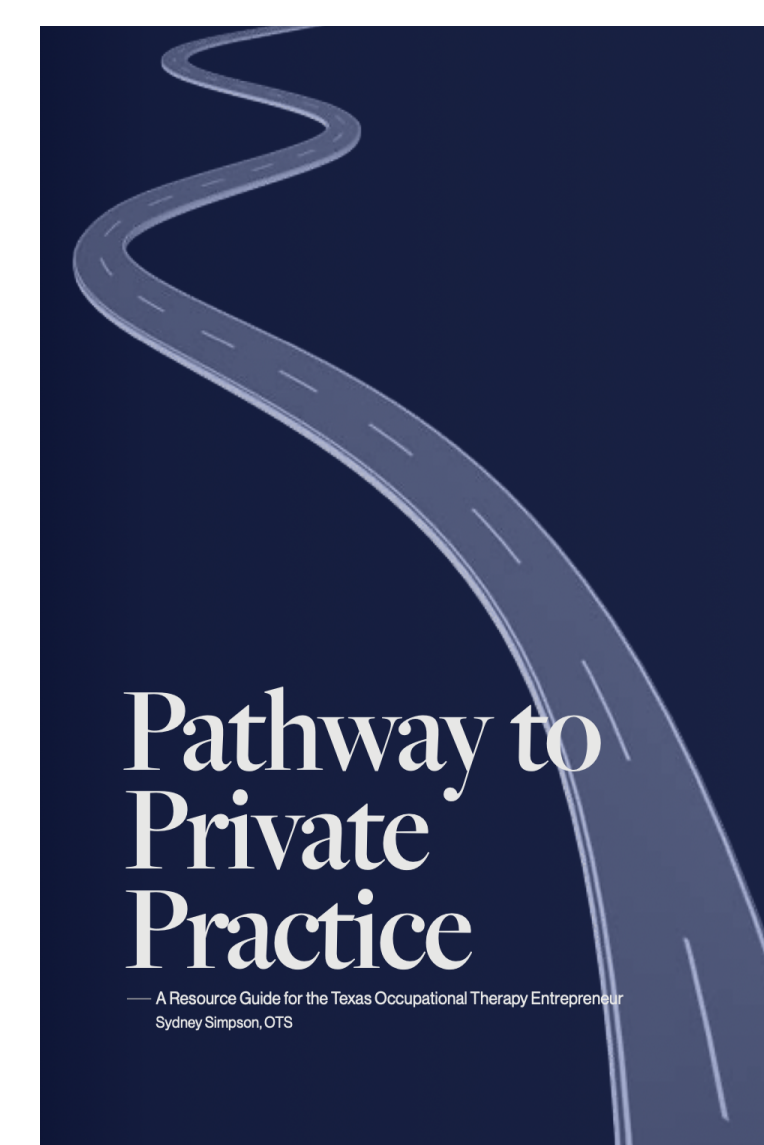
The capstone project goals and objectives were successfully implemented and completed through the use of checklists. Refer to QR for full access to outcome measure objectives.



## Project Implementation & Results

The 14-week capstone experience was implemented as planned, with only minor changes or delays due to extenuating circumstances. I observed the administrative tasks Dr. Holloway implements in her practice, organized interviews with several Texas OTP entrepreneurs, and reviewed the literature to identify the needs of the Texas OT entrepreneurial population. The guide was previously intended to be tailored to prospective OTP entrepreneurs who were new graduates or had 5 years or less of clinical experience. However, the needs assessment revealed a stronger need for a more general guide that is both state and OT-specific. Additionally, Project Goal 2 originally stated that the deliverable project of the

capstone experience would be a co-authored guide. However, it should be noted that the official resource guide responsibilities were delineated so that I would author the guide



### Resource Guide Quick Sheet

"Pathway to Private Practice: A Resource Guide for the Texas Occupational Therapy Entrepreneur" is intended to serve Occupational Therapy Practitioners (OTPs) in Texas who are in the start-up phase of establishing their Occupational Therapy (OT) practice. Embedded in the guide are various links to 100+ resources intended to serve the Texas OT entrepreneur in the start-up process.

The Resource Guide Quick Sheet provides easy access to all 100+ resources from the comprehensive guide. Scan the QR code to view the full table of contents and instantly access each hyperlink from the resource guide.



### Disclaimer

Hyperlinks were active at the time of this resource guide's completion. Additionally, some resources have been included multiple times throughout the sections as these resources apply beyond one aspect of business startups. Resources are listed in alphabetical order rather than in the order they appear in the document.

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with guidance and mentorship from the site mentor as needed. I distributed a survey to my target demographic, which yielded 12 responses. The survey data was analyzed and incorporated into the resource guide draft. Contrary to my original plan, I recruited one business expert and two OT private practice owners to gain a broader perspective and more diverse feedback for my guide. Content feedback from the site mentor, peer reviewers, and ACU Writing Center was addressed. The final draft was formatted into an e-book, along with a corresponding quick-reference sheet that included a QR code linking to a list of all the resources featured in the guide. The outcome measures of this project indicate completion of the specified Capstone Project and Professional Development Goals. Refer to QR for full access to outcome measures and results of this capstone project.

## Discussion & Impact

The resulting capstone project bridges the gap between the clinical expertise of an OTP and the entrepreneurial knowledge needed to start a private practice, which is not typically included in our clinical training. This project contains over 150 resources to support OTPs in the initial stages of launching their private practice. This guide is specific to Texas, outlining state-specific regulations and pointing readers to the most relevant information for their practice. The comprehensive nature of this guide highlights various aspects of business readers may encounter, including those they may not have previously considered. At a minimum, the information and resources included in this guide will hopefully encourage future entrepreneurs to probe deeper when contemplating key areas of business development.

OTPs aspiring to start a private practice often encounter uncertainties and face significant barriers to their success as business owners. However, private practice brings a distinct value to OT, offering clients greater flexibility with payment options, treatment schedules, locations, and plans of care, as some business models operate with fewer treatment method restrictions. Due to the immense value private practice brings to the field, this project was created to help address both the real and perceived barriers that hinder aspiring entrepreneurs from launching a successful business. This guide will empower OTPs to realize that launching a business on their own is achievable. It will assist OTPs, already equipped with the clinical competency, to become successful entrepreneurs and benefit communities across Texas with their unique, valuable OT services.

## References

Scan the QR code for access to project results, outcome measures, and references.

