Psychologist Contingency Planning Checklist

☑ **Nominate a Backup Psychologist**
- Identify a trusted, registered psychologist who agrees to take over client care if needed
- Put the agreement in writing (signed by both parties)
- Share practice information with them (systems, passwords, procedures)

☑ **Prepare Key Practice Information**
- Practice management system login details (e.g., Halaxy, Zanda)
- Accounting system access (e.g., Xero, MYOB)
- Medicare provider numbers and billing arrangements
- Professional indemnity insurance policy details
- Supervision arrangements (if applicable)
- List of active clients with contact details

☑ **Legal & Estate Planning**
- Up-to-date Will with instructions about your business
- Enduring Power of Attorney (so someone can act if you're incapacitated)
- Instructions for executor on handling professional assets (files, accounts, intellectual property)

☑ **Client Care & Records**
- Standard notification letter/email template for clients
- Clear instructions for secure storage, transfer, or destruction of client files
- Outline how prepaid sessions or outstanding invoices will be managed
- Document process for closing Medicare and health fund accounts

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☑ **Communication & Access**
- Provide executor/contingency psychologist with instructions in plain language
- Store important documents in a secure but accessible location
- Ensure passwords and logins are kept securely

☑ **Regular Review**
- Review and update plan annually
- Check backup psychologist's availability every 12 months
- Update when you change practice systems

Accountant for Psychologists

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