

# Checklist & Guide:

Getting Started as a Private Health or Patient Advocate



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# What you can expect:

- This is (in effect) a checklist of steps and some guidelines only. It is not intended to be a book or a formula for starting an advocacy business.
- Each step will have some explanation, then a list of resources to help you complete that step.
- APHA is set up to help you accomplish each step by providing answers or resources.
- Most resources are freely available. Some require purchase (books or courses.)
- Steps may be done in the order you find them, or out of order as you need them.

# Contents:

- Setting your goals
- The business of advocacy
- Education and certification (gap analysis)
- Understanding the healthcare system
- Choosing your services
- Marketing your services
- Choosing your target audiences
- Business details – what you need to get started
- Business details - financials
- Pricing your services
- Ethics and standards
- Where to go from here



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# How To Use This Guide:

- Read the text on each page.
- Read all the associated links. They are provided as links rather than rewriting all the information in this program.
- Look into the additional resources and purchase them if it makes sense to you.
- Have realistic expectations. No career change is easy – if it was, then everyone would do it. Be patient and give yourself time to understand how to make the best decisions for yourself and your practice.



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# Setting Your Goals:

- Do you want to be employed by someone else? Or do you plan to work for yourself? (see page 8)
- What kind of education or training will you need? (see page 12)
- How soon do you want to be doing advocacy work?
- How much money do you want/need to make?
- How long do you plan to work as an advocate? (3 years, 5 or 10 or more?)
- How will you go out of business? (see page 25)



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# Who Will You Work For?

- Independent, private advocacy means that you, as the advocate, will be self-employed, paid directly by the patient, his or her caregiver, or someone else with a vested interest in the patient's well-being (an employer, some forms of attorneys, etc.)
- The Alliance of Professional Health Advocates, this program, and all the resources contained in this program are focused on private, independent advocacy. That means that if your intent is to be self-employed or working for a firm that does not have a conflict of interest for profits' sake, then we can be helpful to you.
- If your intent is to become an advocate or navigator who works as an employee of a doctor practice, a hospital, an insurance company, then this program will be less helpful to you.



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# The Business of Advocacy

This may surprise you (and upset you!)

- **The best advocate in the world** is no longer helping patients (we call them clients) because she was unable to be an effective and efficient business owner.
- **The worst advocate in the world** has a thriving practice, because she's an excellent business woman, and knows how to market and maintain her business.
- Which one of these people will you be?
- Make up your mind that attention to the business aspects of your work will be just as important (if not more so in the first several years of practice) as your advocacy work.
- If you don't plan to work hard on the business side of the work you do, don't bother getting started at all. It will just be a waste of time and money.



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# Are you ready to move forward?

## Doing so assumes:

1. That you do choose to be self-employed (or at least learn more about self-employment) as a private, independent patient or health advocate.
2. That you realize that you will have to focus on the business of advocacy in order to be hired directly by patients and caregivers, and to be successful at advocacy as a business.



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# Education/Training:

- The best advocates look at education and training as something they do at all time – not just as they prepare to be advocates. Plan to update your skills regularly through workshops, webinars and conferences as well as courses you might take.
- Your education **MUST** include business skills. You will not succeed as an advocate without knowing business. If you have previously owned a business then you have a head start! If not, be sure to include business education in your plans.
- Begin your education needs assessment by doing your gap analysis. This will help you figure out what you already know (that's useful) and what gaps you still need to fill in your knowledge bank to move forward.



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# Education/Training:

- Once you've completed your gap analysis, you can begin to choose from among the many dozens of courses and programs to complete the education and training you've determined you need at: <https://www.healthadvocateprograms.com/>
- For more information about what education you might need, your gap analysis, and how to choose the right programs for you, see [The Health Advocate's Start and Grow Your Own Practice Handbook](#).
- To take courses to fill specific knowledge needs, check out our sister site, [PracticeUP! Online](#).

# Advocacy Certification & Licensing

## Health and Patient Advocate Certification

- The Patient Advocate Certification Board offers a path to certification for advocates. Those who earn certification from the PACB are entitled to use the initials BCPA after their names. [Learn more from the PACBoard.](#)
- Many advocacy education programs provide their students with a certificate of completion when they finish. To that end, the student becomes certified by that educational institution. But that is not a nationally / internationally recognized certification. **It does not equate to the PACB certification for that reason.**
- If you want to decide whether certification is necessary, or if you really want to be certified, you can take a [free course at PracticeUP! Online to help you decide.](#)



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# Advocacy Ethics & Standards

- As a new profession, it is imperative we advocates do what we can to create an ethical and professional reputation for the profession. (Put another way, we never want to be perceived as the used car salespeople of healthcare!)
- This is mostly important for patients / clients to recognize – that they will be treated ethically and professionally by those who call themselves advocates.
- To that end, check out the [Health Advocate's Code of Conduct and Professional Standards](#). When you are ready, become a subscriber (no cost to do so). Once you develop a website or business card, you can add the Code logo so potential clients know what you stand for.

# Understanding the Healthcare System

- If the American or Canadian healthcare systems worked well, then there would be no need for private, independent advocates. But increasingly, the best healthcare is becoming harder and harder to find.
- The problem isn't whether providers are well trained, or whether science has made progress (and therefore diagnosis and treatment lag behind where they could be). Rather – the problem is money.
- Healthcare is not about health or care. It's about sickness and money - the cost to obtain, and pay for, care.
- The American healthcare system is profit-based. Thus, many problems arise either from the fact that patients don't have good insurance, or that they do have good insurance and may, therefore, be overtreated.



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# Understanding the Healthcare System

- Bottom line: A client's ability to get what he or she needs is more about the cost of care than it is about whether good care regimens have been developed. An advocate needs to understand that important point and use it to get a client what is needed.
- No matter what forms of advocacy services you hope to provide and get paid for, you must understand how the system in your country works. You must understand how it is paid for, how that affects the care that is available to your client, and how to work around problems your client may have.
- Resources for understanding the healthcare system:
  - [Follow the Money](#)
  - [You Bet Your Life! The 10 Mistakes Every Patient Makes\(How to Fix Them to Get the Healthcare You Deserve\)](#)



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# What Services will you provide?

- As you began to think about becoming an advocate, you probably thought about what kinds of services you would provide – and how you would do that work.
- It doesn't matter whether you have a clinical background or not (meaning – no – you do not have to be a nurse to be an excellent advocate) – but it does matter whether you can convince your target audiences that you can help them, and that paying you to do so is worthwhile. Check out the [list of services listed at AdvoConnection](#) to help you make decisions about your service offerings. (If you will offer something not yet listed, let us know and we may add it.)
- Don't limit yourself to services you perform yourself. In fact, collaborating with others is a great way to grow your practice. [Learn about contracting with others.](#)



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# Business Details - marketing

- To start and grow a private practice, you'll need to market (promote) your services.
- Marketing your services will grow your client base and therefore, your income. That makes marketing (arguably) the most important task you'll spend time on in your first several years of owning an advocacy practice.
- Marketing is comprised of all those things you do, both intentionally and unintentionally, to bring in more paid business. Advertising, public relations, word of mouth, websites, and others – they are all marketing.
- Marketing requires specific planning, including a budget.
- Marketing is an immense topic, so here are your best resources:
  - The Marketing Center, linkable from your APHA dashboard
  - The [Health Advocate's Basic Marketing Handbook](#)



# Who will you provide services to?

- The first step in marketing is figuring out exactly who will need your services. The answer depends, of course, on what those services are. Further, there may be a difference between the people you provide services to, and the people who actually hire you to provide them. Both these categories of people are considered to be your “target Audiences.”

- **Examples:**

- You may help an elderly woman. But it may be her son who hires you. They are both target audiences, but they have different interests in your work.
- You may help a newly diagnosed cancer patient. But it could be his/her spouse who hires you. Again, they are both target audiences, but they have different interests in your work.
- You may review hospital bills for many people. They may hire you themselves, or their employer may hire you to help them.



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# How will you encourage them to hire you?

- Too many newbie advocates think they only need to tell their friends and family members that they are starting their own advocacy business and voila! Their phones will begin to ring.
- But it doesn't work that way for a number of reasons, including:
  - They don't need an advocate at that moment.
  - They don't really understand how you can help them.
  - They may have objections like, they may think you are too expensive, or that the patient advocate in the hospital can help them. (Don't forget the [Allegiance Factor!](#))
- The good-business-person-advocate understands that developing good messaging is important and can overcome these problems.  
Learn more in the ORB > Marketing Center at [myapha.org](http://myapha.org).



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# Services & target audiences

- You can find much more information about services, target audiences, messaging, and overcoming objections in:
  - [The Health Advocate's Start and Grow Your Own Practice Handbook](#)
  - [The Health Advocate's Basic Marketing Handbook](#)
  - The APHA site: log in at: <https://myAPHA.org> \*  
then link to the ORB where you'll find hundreds of articles, podcasts and other media

**From this point, there will be a number of resources cited in the APHA site. In each case you will need to log in before**

**you can link to them at <https://myAPHA.org>**



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# Business Details - Legal



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As you're making decisions about services and target audiences, you can begin taking care of these details that will be required to make you a "legal" business:

- [Determine your business formation](#) and your company name. (see [The Health Advocate's Start and Grow Your Own Practice Handbook](#))
- [Get your taxpayer ID from the IRS](#) (sometimes called an Employer Identification Number)
- Develop your [contract / agreement for working with your clients](#) (available through APHA to Premium and Premium +ADL members. Also found in [The Health Advocate's Start and Grow Your Own Practice Handbook.](#))
- Develop your contract / agreement for working with subcontractors (see note above re: client contract – same info.)

# Business Details - Insurance

- Before you begin helping your first client, you will need to obtain either professional liability or Errors & Omissions (called E&O) insurance – or both.
- Professional liability is usually required for those advocates who are licensed as doctors, nurses or other clinical areas.
- Errors & omissions insurance protects you in case there is a mistake, or a perceived mistake in your work.
- Know that if you are ever sued, it probably won't be because you did something wrong; it will be because your client THINKS you didn't do something right. It's about their perception, and not necessarily reality.
- [Learn more about advocacy insurance options.](#)



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# Business Details - Financials

- There are several aspects to the “financials” of your practice:
  - a. Making sure you have enough money in the bank to get started (this is called capitalization – very important!)
  - b. Developing a conservative budget
  - c. Making sure enough money comes in to cover what must go out in expenses (this is called “cash flow”)
  - d. Making sure you keep good records (bookkeeping)
  - e. Making sure you pay your taxes appropriately
  - f. Making sure you are always creating opportunities to bring in more money (through marketing)
  
- Each of these explanations requires far more than can be covered here. Find the info you need in: [The Health Advocate’s Start and Grow Your Own Practice Handbook](#). Or take a course to develop your financials: [Financial Basics](#)



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# Business Details - Pricing

One of the biggest hurdles almost-advocates find is trying to figure out what to charge for their services.

There is no easy answer. There are too many variables like the services you provide, your background and experience, your geographic location, competition in your area, and others.

Resources for figuring out what to charge for your work:

- APHA (remember to log in first): [Pricing podcasts](#)
- [Take a course](#) which results in your hourly pricing
- [The Health Advocate's Start and Grow YourOwn Practice Handbook](#) (lengthy chapter on doing the math, and putting together pricing packages)



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# Next Steps



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- So that's it! Those are the basics to getting started as a private patient advocate, setting up your own practice, and growing your business.
- You may wonder about the question under GOALS on page 8 that asked, "how do you want to go out of business?" The point to that question is that you do have a few choices, each of which should affect your approach to building your practice:
  1. You might decide to sell your practice in a few years
  2. You might decide to just fade out of business
  3. You might decide nothing, not plan well, and then close your doors because you've run out of money, or have gone bankrupt.

The more you plan, the less chance #3 will be your result.

Which will you do? Prepare well and wisely  
so you meet those goals you've set for yourself.



# Additional Resources

- [How to Start a Patient Advocate Business](#)
- [An Overview of Careers in Patient Advocacy](#)
- [HealthAdvocatePrograms.com](#)
- [The APHA blog](#)
- [The AdvoConnection blog](#)
- [HealthAdvocateResources.com](#)
- [Become an advocate or navigator](#)
- [The AdvoConnection Directory](#)
- [PracticeUP! Online](#) (online courses)



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**The very best of luck to you!**

**Please let us know how we can support you!**

[membersvc@aphadvocates.org](mailto:membersvc@aphadvocates.org)



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