The Day-One Forms Checklist

Which forms you actually need before your first patient — and which can wait.

PSYCH NP FELLOWSHIP
PRACTICE FORMS GENERATOR

STEP 0 · Before you build

decide first, generate second

- [ ] **Policy Decisions Worksheet** — the 10 calls to make before finalizing anything (fees, cards, controlled substances, court/disability stance…)

TIER 1 · Before your first patient

the ⚡ Launch Essentials set in your generator

- [ ] **Patient Intake Form** (with consents)
- [ ] **Telehealth Consent, Policy & Agreement**
- [ ] **Practice Fee Schedule** — the ONE place your $ amounts live
- [ ] **No-Show / Cancellation Policy** — now with cash-vs-insurance fee rules
- [ ] **Patient Election of Self-Pay** — if any cash-pay patients
- [ ] **Patient Conduct & Grounds for Dismissal Policy**
- [ ] **Psychoactive Medication Informed Consent**
- [ ] **HIPAA Notice of Privacy Practices**
- [ ] **Credit Card on File Consent**
- [ ] **Good Faith Estimate** — required for self-pay (No Surprises Act)
- [ ] **Controlled Substance Policy** + Benzodiazepine & Stimulant policies if you prescribe them
- [ ] **Scope of Services & Non-Participation Policy** — what you don't do (court, disability, crisis)

TIER 2 · Your first month

add as real patients arrive

- [ ] **ROI — Release of Information** (TO and FROM practice)
- [ ] **Screening scales you'll use** (PHQ-9, GAD-7, AUDIT…)
- [ ] **Discharge / Termination Policy + Letter**
- [ ] **Patient Safety Plan**
- [ ] **Welcome Letter**
- [ ] **Medical Records Request log**

TIER 3 · As you grow

when the need appears, not before

- [ ] **Membership agreements** — if you add a subscription tier
- [ ] **Letters** (ESA, return-to-work, travel) — at clinical discretion
- [ ] **Treatment plan templates**
- [ ] **Disability Forms Policy** — before the first 14-page packet arrives
- [ ] **Contact & communication logs**
- [ ] **Provider scales** (AIMS, COWS)

> **The one rule that saves you hours later:** keep dollar amounts out of signed policies. Numbers live on your Fee Schedule (and the legally-required Good Faith Estimate) — policies say "per our current Fee Schedule." Fees change? You update one document, not twelve.

Starting templates, not legal advice — have your packet reviewed by a professional licensed in your state.

Generate all of these in minutes →
app.psychnpfellowship.com