Mentalyc

Counseling Private Practice Forms Checklist

Every form a new counseling private practice needs before the first client, grouped by what the law requires and what is best-practice risk management.

Required by law

REQUIRED

- [ ] **HIPAA Notice of Privacy Practices** if you bill insurance electronically
- [ ] **Informed consent for treatment** state law + ACA / APA / NASW ethics
- [ ] **Release of information (ROI)** before most non-treatment disclosures
- [ ] **Good Faith Estimate** No Surprises Act, for self-pay clients
- [ ] **Minor consent + custody docs** state-dependent, clients under 18

Best practice & risk management

RECOMMENDED

- [ ] **Client intake form** adult, child, and couples versions
- [ ] **Telehealth consent** required in most states for remote care
- [ ] **Confidentiality agreement** group, couples, and family work
- [ ] **Financial / cancellation policy** fees, no-show fee, payment timing
- [ ] **Credit card on file authorization** prevents disputes and chargebacks
- [ ] **Superbill template** out-of-network client reimbursement
- [ ] **Crisis / safety plan** warning signs, contacts, means restriction

Ongoing clinical records

EVERY CLIENT

- [ ] **Treatment plan** goals, objectives, interventions, reviews
- [ ] **Progress note template** SOAP, DAP, or BIRP; standardize one
- [ ] **Discharge / termination summary** defends abandonment complaints

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