DOCUMENTS

Documentation in group practice is key. It helps keep your practice organized and streamlines processes. Let's take a look at some of the documents you may need for your group practice. Check off which documents you need so that you have a blueprint for what items to work on.

- ☐ Client Intake Paperwork:
- ☐ HIPAA forms *
- ☐ Outpatient Service Contract *
- ☐ Credit Card on File Authorization *
- ☐ ROI *
- ☐ Demographic Form *
- ☐ Employee Contract
- ☐ Independent Contractor Contract
- ☐ Marketing Log/Tracker
- ☐ Employee New Hire Checklist
- ☐ Employee Manual
- ☐ Teletherapy Authorization Form
- ☐ Job Descriptions (clinician, supervisor, admin, VA)
- ☐ Insurance Fee Schedule Increase Request
- ☐ Consent for Treatment Outside the Office (walk and talk therapy or exposure therapy)
- ☐ P & L Spreadsheet
- ☐ Insurance Termination
- ☐ Request Time Off Request
- ☐ Admin Contract
- ☐ Letterhead
- ☐ Allergy Form
- ☐ Document with your clinician's License numbers, CAQH numbers, NPI numbers, what insurances they are in with
- ☐ W9
- ☐ W4 (for employees)
- ☐ Intake Tracker/Conversions
- ☐ Referral Spreadsheet

Categorize the documents you need to complete or revise. Things that you can write up yourself, put in the "I can do" list. Things that you need your attorney to draft or review, put into the "attorney to do/review" list. On the next page, you will put these things in your Four Week To Do List and complete them over the next four weeks. Even if you don't need them now, you will one day, so get the ball rolling now!

I can do:	Attorney to do/review