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Necessary Forms in Private Practice

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We get it, there's a lot of fear out there over making sure that you have all the necessary forms for your practice. It can be overwhelming as some places offer HUNDREDS of forms. Here we're going to spell out the foundational forms you'll need to get your practice started, along with some suggestions for additional, albeit optional, forms to develop along the way.

Don't forget, with a TPI membership, you get access to our **free Forms Library.**

1. **Intake form, including insurance verification.**

   Consisting of the client's demographic information, contact information, and other providers, as well as a space for insurance verification (if you accept insurance).

2. **Informed consent.**

   Consisting of your policies and procedures, ethical and legal requirements, and administrative practices. Consider including statements on social media or internet reviews, protocol for when your professional will would be enacted, and specific policies related to telehealth.

3. **HIPAA Privacy Practices.**

   This is standard and can be retrieved from the Health & Human Services government website.

4. **Good Faith Estimate (only for clients not utilizing insurance).**

   APA has a sample of this here (https://www.apaservices.org/practice/legal/managed/good-faith-estimate-compliance).

5. **Release of Information.**

   A standard form that allows you to share, and receive, information from other providers. While you may receive a copy from other providers, it's best practice to have a client sign one on your end to ensure true informed consent to the sharing of information.

Suggested additional forms: reduced rate contract; biopsychosocial information gathering template; informed assent; payment contract.

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