ENVISION
COUNSELING CLINIC

Paperwork Checklist

Every Client File

- ☐ Client Information
- ☐ Consent for Communications & Waiver
- ☐ Authorization to use Credit/Debit Card
- ☐ Good Faith Estimate
- ☐ Client Disclosure Form
- ☐ Teletherapy Informed Consent and Safety Plan

These forms are for the client to fill out – usually online.

- ☐ Intake Form (or TheraNest Initial Assessment form)
- ☐ Therapy Plan (on paper or in TheraNest)
- ☐ Progress note for every session (via TheraNest)

These forms are for you to fill out.

For Clients that are Minors

- ☐ Custody Papers (if parents are divorced)
- ☐ If parents have joint custody – make sure both parents sign a Disclosure form

(For clients that are 15-17, a parent may say that the child can consent without a parent's consent. This is legally true, but we will not treat a child if one parent does not want us to treat them. That's yucky.)

Other Forms that may be Necessary

- ☐ Authorization for Release of Information

(Among other times, this form is also needed for 15-17 year-old clients to be able to involve their parents in therapy.)

- ☐ Consent for Third-Party Participation Agreement
- ☐ Disclosure Addendum (if you are offering a reduced rate)
- ☐ Church Partnership Disclosure Addendum (if it's a church partnership client)
- ☐ Medicaid Coverage Acknowledgement