



PMHNP Practice Launch Checklist

Everything to check off before you open your doors — physical or virtual.

01 LICENSING & LEGAL

- ☐ Verify active NP license & prescriptive authority in every state you'll serve
- ☐ Confirm collaborative/supervisory agreement, if your state requires one
- ☐ Obtain DEA registration for each practice state; register with state PDMP
- ☐ Form your legal entity (LLC or PLLC per state rules) & obtain an EIN
- ☐ Secure malpractice insurance with telehealth coverage confirmed in writing

02 BUSINESS FOUNDATION

- ☐ Open a business bank account & set up bookkeeping (separate from personal!)
- ☐ Obtain NPI numbers — Type 1 (individual) and Type 2 (organization)
- ☐ Set your fee schedule & decide your model: cash-pay, insurance, or hybrid
- ☐ Build a 12-month budget covering the 3–6 month credentialing revenue gap
- ☐ Check local business license & registered agent requirements

03 CREDENTIALING & BILLING

- ☐ Complete and attest your CAQH profile before anything else
- ☐ Start payer credentialing NOW — expect 90–150 days per payer
- ☐ Choose billing approach: in-house, outsourced biller, or cash-pay only
- ☐ Create superbill templates for out-of-network reimbursement
- ☐ Verify each payer's telehealth billing rules, modifiers & place-of-service codes

04 CLINICAL OPERATIONS & COMPLIANCE

- ☐ Select a HIPAA-compliant EHR with e-prescribing & EPCS certification
- ☐ Sign a Business Associate Agreement with every vendor that touches PHI
- ☐ Finalize intake packet: consent to treat, telehealth consent, financial policy
- ☐ Write controlled substance prescribing policies & refill procedures
- ☐ Establish an emergency/crisis protocol for telehealth patients by location

05 TECHNOLOGY SETUP

- ☐ Choose a HIPAA-compliant telehealth platform (with signed BAA)
- ☐ Set up a business phone line, secure fax & professional email
- ☐ Enable online scheduling & payment processing (card on file policy)
- ☐ Launch a website with clear "Book an Appointment" conversion points

06 MARKETING & LAUNCH

- ☐ Claim & optimize your Google Business Profile
- ☐ List your practice on Psychology Today & key provider directories
- ☐ Introduce yourself to local PCPs, therapists & universities for referrals
- ☐ Announce your launch on LinkedIn & social channels
- ☐ Build your first 90-day marketing plan — awareness, conversion, retention

Pro tip: Credentialing is your longest lead time. Start payer applications the same week you form your entity — not after your website is done. Every week of delay is a week of unpaid claims.