

## PRACTICE FORM EXAMPLE

# New patient welcome packet

An illustrative welcome packet outline for a new psychiatric patient. Adapt the tone and policies to your practice.

**Educational example only.** This is not legal, medical, or compliance advice, and it is not a ready-to-use legal document. Requirements vary by state, payer, and setting. Adapt anything like this to your own situation and have it reviewed by qualified legal and compliance counsel licensed in your jurisdiction before using it in a practice. You are responsible for compliance with all applicable federal and state laws, including HIPAA. shrinkiatry publishes professional commentary and education, not legal or medical advice.

*Current as of July 7, 2026. Laws, payer rules, and billing codes change. Confirm the current requirements for your jurisdiction and setting before you rely on anything here.*

## Welcome message

A short, warm note: what the practice does, what the first visit is for, and that questions are welcome.

## What to bring or have ready

- Photo ID and insurance or payment method, if applicable
- A current medication list, including doses
- Names of past clinicians and any records you can share
- A few notes on what you want help with

## What to expect at the first visit

An evaluation that reviews your history, current concerns, and goals, then a shared plan. It usually runs longer than follow-ups.

## Policies at a glance

- Cancellation and no-show policy
- How refills and messages are handled, and expected response times
- What to do in an emergency: call 911 or go to the nearest emergency room, and call or text 988 in the US
- Where to find the privacy practices, telehealth consent, and financial policy

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