Informed consent annual review

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use annually and after a law, service, platform, fee, location, or practice-ownership change.	This is not consent language and cannot determine what disclosures your particular practice requires.

Working record

Prepared by	
Reference (no names)	
Date opened	
Next review date	

Six review points

1	**[ ] Inventory every client-facing document** List the consent, notices, policies, and acknowledgments currently used and their revision dates. **Your record:** _____ **Source:** BBS: statutes, regulations, and law changes
2	**[ ] Check identity and license notices** Compare practitioner names, titles, licenses, and required consumer notices with current Board guidance. **Your record:** _____ **Source:** BBS: HIPAA, telehealth, advertising, and notices
3	**[ ] Reconcile services and modalities** Confirm the documents describe what you actually offer, including telehealth and communication channels. **Your record:** _____ **Source:** BBS: HIPAA, telehealth, advertising, and notices
4	**[ ] Reconcile fees and cancellation terms** Compare stated amounts and policies with scheduling, billing, and Good Faith Estimate workflows. **Your record:** _____ **Source:** CMS: No Surprises Act provider resources

5	**[ ] Review privacy boundaries** Map the notice language to actual uses, disclosures, vendors, and client rights. **Your record:** _____ **Source:** HHS: Privacy Rule guidance

6	**[ ] Preserve delivery evidence** Record version, delivery method, acknowledgment, and the plan for issuing revised terms. **Your record:** _____ **Source:** HHS: Privacy Rule guidance

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- BBS: statutes, regulations, and law changes
- BBS: HIPAA, telehealth, advertising, and notices
- CMS: No Surprises Act provider resources
- HHS: Privacy Rule guidance

Educational information only. Not legal, clinical, tax, billing, or regulatory advice. Recheck every source before relying on an older saved copy. Do not put client-identifying information in a copy you cannot secure.