TEMPLATE

Required launch steps checklist

Starting points to adapt with your attorney and advisors, not finished legal documents.

- [ ] 1. Branded website: treatment pages, pricing, intake entry, checkout, healthcare disclosures, privacy and terms, tested on a phone
- [ ] 2. Platform configuration: registration, intake workflows, provider routing, order and prescription workflows, pharmacy connectivity, patient communications, admin access and reporting
- [ ] 3. Provider network integration: state coverage and routing, consult pathways, review and approval workflows, prescription transmission, follow-up and escalation
- [ ] 4. Pharmacy and fulfillment integration: connectivity, formulary and pricing, prescription routing, order transmission, shipping, status workflows, coordination and testing
- [ ] 5. Treatment programs configured: each offering matched to providers, pharmacy products, intake requirements, pricing and fulfillment
- [ ] 6. Patient intake: medical history, medications, allergies, contraindications, consents, identity and lab requirements where needed
- [ ] 7. LegitScript: application, documentation, website and claims review, deficiency responses, renewal and monitoring
- [ ] 8. CRM integration: lead capture, forms, pipelines, routing, messaging workflows, conversion tracking, call-center handoff
- [ ] 9. Phone and call center: workflows, routing, scheduling, escalation, order-status support, clinical-boundary training
- [ ] 10. Payments: pricing and subscriptions, checkout, processor connectivity, recurring billing, receipts, test transactions
- [ ] 11. Compliance review of the live site: disclosures, claims, pricing and subscription transparency, consent and privacy

- [ ] 12. One owner for the chain: website to CRM to platform to provider to pharmacy to patient
- [ ] 13. End-to-end testing of the full patient journey before production
- [ ] 14. Launch and handoff: readiness review, orientation, activation, initial support