APPENDIX B

Master checklists

Before opening each state

- [ ] Verify current patient-location, provider, consent and visit-format requirements.
- [ ] Verify pharmacy coverage for the product and delivery address.
- [ ] Confirm partner contracts, fees, staffing and escalation paths.
- [ ] Test one eligible visit and one ineligible location.
- [ ] Record reviewer, source, date and reason to recheck.

At the start of each business day

- [ ] Review unaccepted intakes, unread patient replies and overdue reviews.
- [ ] Have the clinical team reconcile outstanding lab results and follow-ups.
- [ ] Reconcile prescriptions awaiting pharmacy acceptance and shipments in exception status.
- [ ] Review refund requests, approaching dispute deadlines and failed payouts.
- [ ] Give the oldest unresolved case an owner and a patient update time.

Before adding a treatment or changing a price

- [ ] Obtain clinical review and verify actual product and supplier status.
- [ ] Confirm visit, lab, medication and shipping costs.
- [ ] Update price page, checkout, consent, receipt and renewal messages together.
- [ ] Update the approved claims list before any new creative.

- [ ] Check whether certification, underwriting or ad permissions need updating.
- [ ] Place and cancel a test order before enabling live traffic.

Monthly health check

- [ ] Chargebacks and refund rate trend.
- [ ] Stuck orders and the oldest unresolved case.
- [ ] Complaints logged and changes made.
- [ ] Live creative and affiliate posts spot-checked against the claims list.
- [ ] Policy and drug-status changes re-checked.

Quarterly re-check

- [ ] FDA and DEA positions on your products. (Re-check before publication.)
- [ ] Ad platform policies for your categories. (Re-check before publication.)
- [ ] Certification standards and fees. (Re-check before publication.)
- [ ] State rules for every state you serve.
- [ ] Partner licenses and insurance certificates current.

EVERY LAUNCH

The 14 required launch steps

- [ ] 1. Branded website. Treatment pages, pricing, intake entry, checkout, healthcare disclosures, privacy and terms, tested on a phone. (Chapter 7)
- [ ] 2. Platform configuration. Patient registration, intake and questionnaire workflows, provider routing, order and prescription workflows, pharmacy connectivity, patient communications, admin access and reporting. (Chapter 11)
- [ ] 3. Provider network integration. State coverage and routing, consult pathways, review and approval workflows, prescription transmission, follow-up and escalation. (Chapter 11)
- [ ] 4. Pharmacy and fulfillment integration. Connectivity, formulary and pricing, prescription routing, order transmission, shipping, status workflows, coordination and testing. (Chapter 11)
- [ ] 5. Treatment programs configured. Each offering matched to providers, pharmacy products, intake requirements, pricing and fulfillment. (Chapter 9)
- [ ] 6. Patient intake. Medical history, current medications, allergies, contraindications, consents, and identity and lab requirements where the treatment needs them. (Chapter 7)
- [ ] 7. LegitScript. Application, documentation, website and claims review, deficiency responses, then renewal and monitoring. (Chapter 3)
- [ ] 8. CRM integration. Lead capture, forms, pipelines, routing, messaging workflows, conversion tracking and call-center handoff. (Chapter 11)
- [ ] 9. Phone and call center. Workflows, routing, scheduling, escalation, order-status support and clinical-boundary training. (Chapter 11)
- [ ] 10. Payments. Pricing and subscriptions, checkout, processor connectivity, recurring billing, receipts and test transactions. (Chapter 12)
- [ ] 11. Compliance review of the live site. Provider and pharmacy disclosures, claims, pricing and subscription transparency, consent and privacy. (Chapter 8)
- [ ] 12. One owner for the chain. Website to CRM to platform to provider to pharmacy to patient. (Chapter 13)

- [ ] 13. End-to-end testing. The full patient journey, tested before production. (Chapter 14)
- [ ] 14. Launch and handoff. Readiness review, orientation, activation and initial support. (Chapter 14)

BY CHAPTER

Chapter checklists

Chapter 1. How Telemedicine Works: The Four Players

- [ ] Write the one-sentence description of your business: who prescribes, who fills, who runs the platform
- [ ] Name the company that will fill each of the four roles, or mark it "to choose"
- [ ] Draw your own version of the order flow on one page
- [ ] Mark every step where an order could get stuck, and who would notice
- [ ] Write down the money trail: who charges, who pays whom, who refunds
- [ ] List every vendor that will touch patient data
- [ ] Write down who answers for each decision
- [ ] Read your homepage and remove anything you do not control, such as guaranteed prescriptions or delivery dates
- [ ] Book a call with a healthcare attorney before signing partner contracts

Chapter 2. Choosing Your Model

- [ ] Write down your budget, launch date and control needs
- [ ] Write down what one extra month of delay costs you
- [ ] Compare at least three platforms or partners on the same terms, including exit costs
- [ ] Confirm whether your planned products need 503A, 503B, or both
- [ ] Trace the ordering, dispensing and shipping entity for one state, end to end

- [ ] Confirm who owns patient records, and get a sample export
- [ ] Confirm current FDA status for every compounded product you plan to offer (Re-check before publication.)
- [ ] Have a healthcare attorney review the partner agreement
- [ ] Write down what would make you switch models later

Chapter 3. The LegitScript Decision

- [ ] Decide Route A or Route B, and write down why and when you will revisit it
- [ ] Read the current certification standards and application checklist
- [ ] Get partner license lists in writing, including the pharmacy's certification or accreditation status
- [ ] Name your pharmacy and provider group on the site
- [ ] Remove all outcome and "FDA-approved" claims for compounded drugs
- [ ] Gather ownership documents for every owner, and disclose any disciplinary history
- [ ] List every domain you control, and disable stale pages and checkouts
- [ ] Confirm current fees and decide on expedited review (Re-check before publication.)
- [ ] Submit in week 1, then answer reviewer questions within days, not weeks
- [ ] After approval, apply for Meta and Google authorization separately (Re-check before publication.)
- [ ] Put the renewal date and the 30-day notice rule on your compliance calendar

Chapter 4. Setting Up the Business

- [ ] Entity formed and operating agreement signed

- [ ] EIN issued and saved
- [ ] State tax registration done
- [ ] Local business license checked
- [ ] Trade name filed where your brand differs from your legal name
- [ ] Business bank account open, and personal money kept out
- [ ] Domain registered to your entity, with two-factor login
- [ ] Website ownership and export terms in writing
- [ ] Certification applied for in your entity's name, for your domain
- [ ] Merchant account in your entity's name, depositing to your bank
- [ ] Written answer on who owns patient records and how they are exported
- [ ] Compliance folder created with every document
- [ ] Annual filings and renewals on a calendar, with a backup owner

Chapter 5. Compliance Basics

- [ ] List every state you will serve and confirm provider and pharmacy coverage
- [ ] Keep a state coverage record per state, with the date checked
- [ ] Sign BAAs with every vendor that touches patient health information
- [ ] Confirm whether the FTC Health Breach Notification Rule or state health data laws apply to you (Re-check before publication.)
- [ ] Confirm your corporate structure with a healthcare attorney
- [ ] Label every product as FDA-approved or compounded

- [ ] Check current FDA status for each compounded drug you sell (Re-check before publication.)
- [ ] Check current DEA rules for any controlled substance (Re-check before publication.)
- [ ] Track certification, underwriting and ad authorization as three separate items

Chapter 6. Insurance: What Each Coverage Is For

- [ ] Collect every insurance clause from your partner contracts
- [ ] General liability bound at the limits your contracts require
- [ ] Workers' compensation in place before your first employee starts, with employer's liability at contract limits
- [ ] Privacy and cyber liability bound, with sub-limits reviewed
- [ ] Umbrella or excess decided, if contracts require higher limits
- [ ] Certificates received from your provider group, pharmacy and platform
- [ ] Additional-insured endorsements issued for every party that requires one
- [ ] Claims-made policies identified, with retroactive dates recorded
- [ ] Renewal dates on your compliance calendar
- [ ] Coverage requirements re-checked with your broker at each renewal

Chapter 7. Building the Website

- [ ] Treatment pages written and reviewed by your provider group
- [ ] Full price shown before checkout, including what recurs and how to cancel
- [ ] Provider group, pharmacy and states served disclosed on the site
- [ ] Terms, privacy policy, telehealth consent and refund policy live and linked in the footer

- [ ] Intake written with your provider group, with disqualifiers and location check
- [ ] Identity and lab requirements built in where the treatment needs them
- [ ] Consent to care, recurring billing and marketing captured separately with version and timestamp
- [ ] Every claim reviewed against the list in this chapter
- [ ] Full path tested on a small phone with the keyboard open

Chapter 8. Creative Design: Brand, Site and Ads That Pass Review

- [ ] Brand name and design reviewed for implied outcomes or pressure tactics
- [ ] Approved claims list written for every treatment, with version and date
- [ ] Banned words list shared with every writer and agency
- [ ] Images and video reviewed for implied results and undisclosed paid relationships
- [ ] Ads matched to landing pages, with no condition targeting
- [ ] Platform ad policies read for each platform you will use (Re-check before publication.)
- [ ] Live site reviewed against the six Step 11 checks
- [ ] One named approver set, with written approvals recorded
- [ ] Monthly spot-check of live creative scheduled

Chapter 9. Products and Pricing

- [ ] Pick one category to launch

- [ ] Confirm each product's regulatory status with your pharmacy and attorney (Re-check before publication.)
- [ ] Configure each treatment program: providers, products, intake, pricing, fulfillment
- [ ] Build a per-order cost sheet with every fee
- [ ] Price month one and a renewal separately
- [ ] Set a price that still makes money after refunds and chargebacks
- [ ] Write a clear subscription and cancellation policy

Chapter 10. Ads and Marketing

- [ ] Read the current pharma and telehealth policy for each platform you will use (Re-check before publication.)
- [ ] Get the certifications and authorizations those platforms require
- [ ] Start an email list before your first ad
- [ ] Affiliate program set up with tracked links or codes, written terms and disclosure rules
- [ ] Affiliate payment structure reviewed by counsel
- [ ] Campaign naming convention and link parameters agreed
- [ ] Conversion events chosen that carry no health information
- [ ] Health information removed from URLs, titles and events visible to tracking tools
- [ ] Text-message consent wording reviewed and consent records stored (Re-check before publication.)
- [ ] Testimonials real, typical or labeled, and disclosed if paid
- [ ] Have every ad reviewed against your claims list by your named approver

Chapter 11. Operations

- [ ] Write the full order flow with an owner per step
- [ ] Set a target time per step and a daily stuck-order report
- [ ] Platform configured: registration, intake, routing, orders, pharmacy link, communications, admin and reporting
- [ ] Provider network integrated: roster, consult pathways, review workflows, transmission, escalation
- [ ] Pharmacy integrated: connectivity, formulary, routing, transmission, shipping, statuses, tested
- [ ] CRM integrated: lead capture, forms, pipelines, routing, automations, conversion tracking, call handoff
- [ ] No health details in marketing fields; BAA in place if the CRM holds health information
- [ ] A2P 10DLC brand and campaign registered before any business texting (Re-check before publication.)
- [ ] Phone workflows, routing, scheduling and escalation in place
- [ ] Agents trained on clinical boundaries
- [ ] Refund policy published
- [ ] Recall and adverse-event process agreed with your pharmacy, and a mock recall run

Chapter 12. Payments

- [ ] Apply for certification before or alongside processor applications
- [ ] Processor file ready: entity, EIN, bank letter, ownership, contracts, website
- [ ] Decide merchant account or payment service provider, with written answers to the five questions

- [ ] Confirm current processor policies and published approval windows (Re-check before publication.)
- [ ] Pricing and subscriptions configured to match treatment programs
- [ ] Gateway test and live credentials set up and secured
- [ ] Checkout shows full price and cancellation terms
- [ ] Recurring billing, retries and cancellations tested
- [ ] Billing descriptor set to your brand name and checked on a real statement
- [ ] Receipts and reminder emails live
- [ ] Test charge and refund completed and reconciled
- [ ] Chargeback alerts turned on
- [ ] Backup processor approved and tested

Chapter 13. Hiring and Vendors

- [ ] List every vendor and what they own
- [ ] Verify licenses, insurance and BAAs
- [ ] Call two references per key vendor
- [ ] Ask each key vendor to demonstrate a failure
- [ ] Confirm exit and data terms in writing
- [ ] Retain a healthcare attorney, accountant, compliance consultant and insurance broker
- [ ] Name one owner for the chain, with vendor contacts and escalation paths written down

Chapter 14. Launch Plan: Your First 30 Days

- [ ] LegitScript, processor and insurance applications submitted in week 1
- [ ] A2P 10DLC registration submitted once the EIN is issued
- [ ] Week 1 gate passed
- [ ] Week 2 gate passed
- [ ] Week 3 gate passed, including one full end-to-end test order
- [ ] Week 4 gate passed, with a recorded go, limited go or hold
- [ ] Readiness review, orientation and activation complete
- [ ] Daily dashboard running, and daily review for the first two weeks

Chapter 15. Case Studies and Mistakes to Avoid

- [ ] Review this chapter's mistakes list against your business monthly
- [ ] Keep a backup for every critical partner
- [ ] Re-check drug status, ad policies and certification standards every quarter (Re-check before publication.)
- [ ] Re-check your privacy promises after every marketing tool change
- [ ] Log every complaint and what you changed