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Attachment 2

Checklist Following Initial Client Interview:

- ➢ *Get 10-15 <u>blank</u> releases signed by your client. While each agency, hospital, etc. may require their own release of information to request records, it is best to start with as many releases as possible – blank and specific.*
- ✓ *Charging documents/law enforcement reports/supplemental reports (additional needs/missing documentation):*

  _____

  _____
- ✓ *Court dates set:*

  _____

  _____
- ✓ *Medical/Emergency Department records to request:*

  _____

  _____

  _____
- ✓ *Mental health records to request:*

  _____

  _____

  _____
- ✓ *School records to request:*

  _____

  _____

  _____
- ✓ *Family/relative/friend to contact and purpose (i.e. bond, testify at preliminary hearing, collateral information, etc.):*

  _____

  _____

  _____
- ✓ *Competency/criminal responsibility evaluation needed?* ☐ Yes ☐ No;

  Issues/Concerns to be addressed:_____

  _____

  _____
- ✓ *Any medical conditions needing immediate attention? Safety issues? Action(s) taken:*

  _____

  _____

  _____
- ✓ *Investigation needed (type/due date):*

  _____

  _____

  _____

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