Attachment 2

Checklist Following Initial Client Interview:

- ➢ *Get 10-15 blank 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):*

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- ✓ *Court dates set:*

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

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- ✓ *Mental health records to request:*

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- ✓ *School records to request:*

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

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

  Issues/Concerns to be addressed:______________________________

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

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

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