

Checklist for Clients

The consulting process is a team effort which engages both consultant and client in asking questions and sharing all relevant information. The checklist below will assist client and consultant in moving through the steps to complete the research and be ready to implement the Recommended Action Plan in a timely fashion.

- _____ Contract signed, payment made on _____
- _____ Student profile
- _____ Custody order (*any explanation about custody arrangement*)
- _____ Parent narrative
- _____ Psychological/educational assessment (*and other relevant testing and diagnostic reports*)
- _____ School records, reports, transcripts
- _____ Medical records
- _____ Names and contact information for professionals working with client
- _____ Signed authorization for professionals to release confidential information to consultant
- _____ Contact information for transport professionals if needed
- _____ Criteria for programs/schools/RTCs
(*e.g. region, co-ed, methodology, accreditation, staff qualifications, medication policy, other*)
- _____ Working list of programs/schools/RTCs under consideration
- _____ Timeline, target date for implementation of Action Plan
- _____ Other notes and understandings:



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Thank you!