

Initial Preparation Checklist

Client Name: _____ Date: _____

S.S.N.: _____ Phone Number: _____

Emergency Contact Name: _____ Phone: _____

Emergency Contact Name: _____ Phone: _____

Emergency Contact Name: _____ Phone: _____

Complete this checklist when you first begin a case or when this client may be considered.
Initials: _____ Date: _____

Thoroughly incorporate assessment including basic history, medical history and
psychosocial history/appointment. Please do not assume the client is complete in
assessment, refer the client for repeat evaluation and family consultation.

If there has to be an intake, will you honor confidentiality by law or common
relationship, just as you would honor information the family/patient
disclosed to you during their hospital stay. Review this and pertinent information
prior to disclosure.

Involves the family, so the extent they are involved into client family or client
additional family related disclosure and to the extent that the family/patient can only know
about the involved in the treatment.

Obtain information to reduce information to relevant procedures and
appropriately document records, including pre-hospitalizations and interventions of
clients.

Review any medical and/or psychosocial records, possibly from emergency services
knowledge about history for the client. Pay particular attention to medications that have side
effects associated with increased depression, thoughts of suicide or self-harm.

Identify risk factors for the family during the process (see below)