NewLeaf Pathways
Supporting Your Journey to Wellness

FREE RESOURCE

Evaluation Prep Checklist

Gather the items that apply to your referral. Confirm the required documents and secure intake instructions before your appointment.

- [ ] **Government-issued photo ID**

A driver's license, state ID, or passport.

- [ ] **Referral paperwork**

Relevant violation documents, court order, citation, or employer/HR referral.

- [ ] **Employer or DER contact for DOT cases**

Name, email, and phone for the employer or designated employer representative.

- [ ] **Prior treatment or assessment records**

Relevant discharge summaries, completion certificates, or prior evaluations, if requested.

- [ ] **Current medication list**

Medication names and doses, including prescribed and other medicines.

- [ ] **Report recipients and permissions**

Confirm who will receive the report and what authorization or required disclosures apply.

- [ ] **Payment and intake requirements**

Confirm the payment arrangements and required forms for your specific service.

- [ ] **A private setting for virtual appointments**

Arrange privacy, a reliable connection, and the required camera/audio setup. Confirm location requirements with the provider.

Do not email clinical records or sensitive details. Ask for the appropriate secure document-transfer route.