

Educational Consultant
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Checklist for Clients

**This checklist will assist client and consultant in moving through the steps to implement Recommended Action Plan in a timely fashion.*

Contract signed, payment made on _____

_____ **Student Profile (school history, a bit of chronology, all contact information)**

_____ **Parent Narrative (tell the story - from the heart of your child's development - from childhood to present: strengths, gifts, needs, issues, breakthroughs, achievements, interests, setbacks, goals going forward)**

_____ **Psychological/Educational Evaluation (and all relevant testing)**

_____ **School records, reports, transcripts, medical records**

_____ **Names and contact information for professionals working with client**

_____ **Signed form given to 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)**

_____ **Timeline, target date for implementation of Action Plan**

**This process is an exploration, a quest for hopeful solutions to challenging problems. This is a journey on which there may be surprises, twists and turns. The parent-consultant relationship goes best when all questions are welcomed, sharing of information is complete, trust is high, and communication is thorough and candid.*

