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.

Type in the boxes using a PDF reader such as Adobe Acrobat, or print and write by hand. Your answers stay on your device; nothing is sent to NewLeaf Pathways.

Bring or have ready

- [ ] **Government-issued photo ID**
  A driver's license, state ID, or passport.
- [ ] **Referral paperwork**
  Violation documents, court order, citation, or employer/HR referral.
- [ ] **Employer or DER contact (DOT cases)**
  Name, email, and phone for the employer or designated employer representative.
- [ ] **Prior treatment or assessment records**
  Discharge summaries, completion certificates, or prior evaluations, if requested.
- [ ] **Current medication list**
  Names and doses of prescribed and other medicines.
- [ ] **Report recipients and permissions**
  Who will receive the report, and what authorization or required disclosures apply.
- [ ] **Payment and intake forms**
  Payment arrangements and the required forms for your specific service.
- [ ] **A private space for virtual appointments**
  Privacy, a reliable connection, and a working camera and microphone. Confirm location requirements with the provider.

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

Support when you need it

911
Immediate danger

988
Call or text for crisis support, 24/7

1-800-662-4357
SAMHSA treatment referral, 24/7