Instruction Checklist for Case Management & Rehabilitation
1. Instruction Received
Confirm the purpose of the instruction:
Initial Needs Assessment (INA)?
Ongoing case management or consultation?
Identify the instructing party:
Lawyer, insurer, or other organization.
Single Instruction or shared responsibility (e.g., SJE-like scenario).

2. Scope of Work Defined
Questions or objectives clearly outlined:
Specific client needs to address?
Timelines or legal frameworks to consider?
Evidence or documents provided:
Medical records, pre-accident history, and rehabilitation notes.
Bundled, paginated, and indexed (request this if not included).

3. Consent and Client Communication
Confirm instructing party will facilitate:
Signed consent for medical records and INA visit.
Initial client communication to set expectations.

4. Payment Terms Confirmed
75% payment upfront agreed and invoiced.
Final 25% + expenses to be invoiced post-report submission.

5. Fit for Role
Does the case align with your expertise and capacity?
Clarifications needed:
Any missing documents or gaps in instructions?
Is additional information required before the INA visit?

Use clear, concise phrasing to make the form more user-friendly for both you and the instructing party.
Example: Replace legal jargon with action-based prompts like:
“What is the main purpose of this instruction?”
“What documents or evidence are being provided?”