

Intake Checklist: Visitation/Custody

- ___ Paperwork filled out
- ___ Next Court Date? _____
- ___ Ask about previous mediation experience
- ___ Explain benefits of mediation
- ___ Explain role of mediator
- ___ Discuss the role of attorneys
- ___ Describe the 6-step model
- ___ Discuss possible outcomes of mediation & enforcement issues
 Full agreement, partial agreement, temporary agreement, impasse, continuation,
 One-Party Request
- ___ Review 48-hour cancellation policy and \$100.00 no show fee
- ___ Discuss scheduling process
- ___ Explain parking procedures
- ___ Ask for background information about the case.
 Note concerns, goals, and observations on Intake Grid
- ___ Review concerns and goals with the client
- ___ Ask about the client's comfort level with mediating in the same room
- ___ Review answer about police calls or other custody actions
- ___ Ask follow-up questions about any areas of DV concern.
- ___ Ask if the client or family is or has been involved with other courts/agencies
 (DCS? Child Support? Criminal Court? OP Court?)
- ___ Fee paid? If not, what payment arrangements were discussed?

- ___ Follow-up information requested? _____
- ___ Demographic or other important information: _____

- Name: _____
- Date: _____
- Staffperson: _____

Intake with _____

Date _____

Background

Goals

Concerns

Observations