

ATTORNEY REFERRAL INTAKE CHECKLIST

Civil rights | custody death | catastrophic trucking | wrongful death

Start with conflict screening, not documents. Use the public referral form only for names and basic routing information. Wait for conflict clearance and approved transfer instructions before sending substantive or confidential material.

INITIAL CONFLICT CHECK

- ☐ Prospective client, adverse party, agency, entity, and other names needed for screening.
- ☐ Referring lawyer and firm contact information.
- ☐ Matter category, incident date, and county, facility, roadway, or carrier.
- ☐ Known deadline or immediate evidence-preservation concern.
- ☐ Referral or co-counsel preference, if known.

SEND FOR SCREENING

- ☐ Names required for a conflict check.
- ☐ Your contact details and preferred callback method.
- ☐ Basic category, date, location, and urgency.

DO NOT SEND YET

- ☐ Medical, autopsy, or death records.
- ☐ Reports, pleadings, photos, video, or emails.
- ☐ Detailed narratives or other confidential documents.

TIME-SENSITIVE MATTER

For an imminent deadline or evidence-loss concern, call **(405) 759-0515**. Do not rely only on the public form for an urgent issue.

Submitting information does not create an attorney-client relationship. Representation begins only through a written agreement. Any referral or co-counsel arrangement is considered case by case and remains subject to client consent and applicable professional-conduct rules.

AFTER CONFLICT CLEARANCE

- ☐ A concise chronology, current procedural posture, and known deadlines.
- ☐ Filed pleadings, material orders, notices, and key correspondence.
- ☐ Preservation letters or record requests already sent and any responses received.
- ☐ Available incident, crash, police, jail, medical, autopsy, or death records.
- ☐ Photos, video, body-camera material, dashcam material, or other digital evidence.
- ☐ Known insurance, carrier, contractor, agency, witness, or expert information.

EVIDENCE WATCHLIST

CIVIL RIGHTS AND CUSTODY

- ☐ Facility and body-camera video.
- ☐ Cell-check, observation, transport, and incident logs.
- ☐ Medical records, medication records, and vital-sign documentation.
- ☐ Policies, training, staffing, investigation, and contractor records.

COMMERCIAL TRANSPORTATION

- ☐ ECM, ELD, dashcam, telematics, and dispatch data.
- ☐ Driver qualification and hours-of-service material.
- ☐ Inspection, maintenance, repair, and post-crash records.
- ☐ Carrier, broker, shipper, cargo, and insurance information.

WORKING PROCESS

1

Conflict check

2

Attorney review

3

Written arrangement

4

Communication plan

Important: This checklist is a routing aid, not acceptance of a matter or a complete preservation plan. The relevance and availability of evidence depend on the facts, custody, retention systems, applicable law, and court process.