

**JHSO - CCMS Client referral checklist / Template for 1st round of questions**

**Client name**:

**Referring CBSA CLO or Officer name:**

Topics / Areas

**Language:**  
 Is an interpreter needed for reporting? If so, a contract + payment will need to be arranged through CBSA.

**Workers / Counsel / Staff:**  
 Get a list of all lawyers, representatives, counsellors, doctors, case workers, etc. that the client is involved with at this time, who will work with him or who have worked with him up to 2 years ago. Add all to the ROI form.   
Initiate contact with counsel / reps and get them involved in the legwork necessary to on-board client for CCMS.

**Family / Friends:** Get list of people the client will call and visit, get CBSA to confirm that the client can speak to these people.  
 Get list of family/friends that JHS staff could reach out to get in touch with client if client unreachable. Have these people added to the ROI form.  Does the client have kids or dependents? If so, add them to ROI form and verify if there is any family court involvement. Add CAS + family lawyer to ROI form.

**Finances:**  
 Does the client have any bank accounts? Does the client have any debit or credit cards?   
 ODSP / OW: who are his workers (past / present): add both agencies to ROI  
 If client needs to (re)apply: make appointment with OW and/or ODSP and prepare necessary paperwork (proof of residency in Ontario, bank statements covering last year, custody paperwork, medical confirmation paperwork (or make necessary apts.) to get MD to confirm disability.

**Education / training:**  
 Find out if the client has completed any education, training programs, workshops or any other programming while in custody. Obtain copies of relevant certificates or written proof from OCDC or the respective workers that the program/course was completed.  
 If the client states they have completed formal education (High-school, college, University) ask if they has access to diplomas, transcripts, etc. These may be required for enrollment into further programs.

**Completed programming:**  
 Find out if the client competed and workshops or individual or group treatment plans (substance use, AM, spousal abuse, etc.) prior to or during incarceration.  
 Obtain ROI for agencies where programming was completed and obtain written proof of completion.

**Physical & Mental health**:  
 Obtain list of physical health problems and ongoing or required treatment.  
 Obtain list of meds that the client will need once out  
 Obtain name, contact info and ROI for family physician.  
 Obtain name, contact info for pharmacy, if client will need to pick up meds.  
 Obtain list of mental health diagnoses and ongoing or required treatment.  
  
 Obtain ROI for MH practitioners in order to schedule appointments.   
 If client has had suicidal ideation while in custody, obtain more info from OCDC, CSC & CBSA.

**Criminal history and outstanding charges**  
 Obtain criminal record.  
 Obtain info on current charges.  
 Obtain background info on any convictions for Fail to Comply, Fail to attend Court or Breach of parole or probation charges; it is important that we learn what didn’t work (and what did work) to better plan the client’s release.   
 If the client has outstanding criminal charges, get name / contact info and ROI for criminal lawyer.

**Substance use**  
 If the client has had recent substance use (alcohol and/or drugs), obtain a full list of the substances and timeline (age when first started, last time consumed, current consumption rate/doses, if substances were involved with any criminal acts, etc.)   
 If CBSA / IRB want client to attend substance use programming, confirm client’s eligibility for community programming. **PhyPhy**

**I.D. / travel documents**  
 If the client has any valid ID or travel documents, obtain copies for file.  
 If the client will need to apply for ID (health card, etc.), verify client’s eligibility and make arrangements for the application to take place ASAP.

**Life necessities:**  
 go over what the client has and what they will need, for example:   
  clothing (obtain client’s clothing sizes, shoe size)   
  toiletries   
  contact (phone, internet)  
  transportation (bus pass, rides from family, car)  
  food

**Housing**  
 Discuss the client (in general – no specifics) with housing worker to discuss eligibility and needs.   
 Obtain external ROI form for all shelters in case the client loses housing or is not at home and suddenly in a shelter.

**Transportation:** Go over transportation needs that will be required if released:  
  to get to JHS  
  to get to CBSA  
  to make it to IRB hearings, appeals in Montreal  
  to make it to court  
  to make it to other government and community partners