

**Tickler Checklist**  
 (\*\*Keep on top of file\*\*)

<b>Client:</b>				<b>Case opened:</b>			
<b>Initial Intake Checklist</b> completed and copy given to client on:							
<b>Revised date:</b>							
<b>Materials Given to Client</b>				<b>Date</b>			
Unbundling Description							
Brochure							
Referral Information							
Directions to Court							
Family Court Services							
Facilitator							
DCSS							
Other							
<b>Worksheet regarding scope of services and services NOT performed _____ Modified</b> and signed by attorney and client (new form for each change in scope)							
<b>Dated:</b>							
<b>Notice of Limited Scope Representation</b> served and filed (if going on record)							
<b>Documents in Hand Signed by Client</b>			<b>Date</b>		<b>Modified on</b>		
Intake Checklist							
Issues to be Apportioned							
Tasks to be Apportioned							
Retainer Agreement No.							
Other:							
Other:							
Other:							
<b>Case Conclusion</b>							
Closing Letter Sent:							
Substitution of Attorney Sent to Client _____ (date), Signed by Client _____ (date), Filed _____ (date).							
Application to be Relieved as Counsel Served and Filed _____. Order Granting Application Filed _____.							
<b>Case Closed:</b>							
<b>Other Comments:</b>							