



New Client Documents Checklist

A simple checklist to help your family prepare for ABA services.

Getting everything together early can help the intake and authorization process move more smoothly.

PLEASE HAVE THESE ITEMS READY

- ☐ **Autism diagnostic report** - if available, including the diagnosing provider and date of diagnosis.
- ☐ **Psychological or developmental evaluation** - if one has been completed.
- ☐ **Insurance card** - front and back of the current primary and secondary insurance cards.
- ☐ **Medicaid card / Medicaid ID** - when applicable.
- ☐ **Most recent IEP or 504 Plan** - if your child receives school-based supports.
- ☐ **Previous ABA assessment or treatment plan** - if your child has received ABA before.
- ☐ **Relevant therapy records** - such as speech, occupational therapy, physical therapy, or other evaluations when helpful.
- ☐ **Guardianship or custody documents** - when applicable.
- ☐ **Relevant medical records** - when they may affect treatment, safety, medications, allergies, or care.
- ☐ **Completed Sunshine Therapies intake form** - including family goals, scheduling availability, and current concerns.

BEFORE YOU SUBMIT

- ☐ Confirm that the insurance information is current.
- ☐ Make sure phone numbers and email addresses are correct.
- ☐ Include the best person for scheduling and authorization communication.
- ☐ Tell us about any immediate safety concerns, elopement, aggression, self-injury, allergies, seizures, or other important medical needs.
- ☐ Let us know if another provider, school, physician, or therapist should be included in care coordination.

Questions?

We are happy to help you determine which documents apply to your child.

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