

Checklist for Selecting a Life Care Planner

✓ Professional **qualifications**?

- **Education** including degrees and continuing education? If doctorate, was the university accredited? (Some have “mail order” diplomas or degrees from “universities” which are less than stellar.)
- **Work** experience?
- **Life Care Planning** experience?
- **Research** knowledge and experience?
- **Certifications or Licenses**? Generally accepted rehabilitation certifications include **CLCP** (Certified Life Care Planner), **CRC** (Certified Rehabilitation Counselor), **CDMS** (Certified Disability Management Specialist), **CVE** (Certified Vocational Evaluator), **CRRN** (Certified Rehabilitation Registered Nurse), **CCM** (Certified Case Manager), Diplomate or Fellow **ABVE** (American Board of Vocational Experts).
- **Forensic experience** (if appropriate)? Familiar with the rules pertaining to experts? Have they testified? Do they have a list of cases in which they testified at deposition or trial for the previous four years? Plaintiff/Defense ratio?

✓ Prospective consultant's **awareness** of Life Care Planning?

- Are they a Board-**Certified** Life Care Planner?
- Have they achieved the **Certificate** in Life Care Planning offered through the University of Florida?
- Have they completed **courses** offered by a noted program on Life Care Planning (e.g., Rehabilitation Training Institute, Intellicus, University of Florida, NARPPS, et al.)
- Can they cite Life Care Planning **references**?
- Do they know some of the **professionals** associated with Life Care Planning publications and training (e.g., Terry Blackwell, Richard Bonfiglio, Paul Deutsch, Susan Riddick-Grisham, Julie Kitchen, Patti McCollom, Robert Meier, Anne Sluis-Powers, Horace Sawyer, Randall Thomas, Roger Weed, Terry Winkler, Jim Young)?

✓ **Commitment** to the profession?

- What professional and disability specific **organization(s)** do they belong to? (Are they “legitimate” or fringe organizations such as a for-profit owned by an individual or group with little recognition or substance?)
- Do they **participate** in professional development?
- Have they **contributed** their time and effort by volunteering services to clients in need, speaking, holding office with professional organizations, writing articles, chapters or books?
- Have they received **awards, honors, peer recognition**?

✓ **Industry** experience?

- Workers' compensation or Federal Office of Workers' Compensation Programs?
- Personal injury?
- Social Security?

- State rehabilitation?
 - Longshore workers?
 - Jones Act?
 - Federal Employees Liability Act (FELA)?
 - Long term and short term disability?
 - Specialization in a particular disability?
- ✓ **Medical foundation** for opinions established?
- Use established published **checklists** and **forms**?
 - Routinely consult with a **physician** as part of the team?
 - Include other **health professionals** as appropriate (e.g., OT, PT, SLT, RT, Audiology, Neuropsych, etc.)?
- ✓ Other
- What and how do they **bill** for their services? Do they charge different rates for interview, records review, deposition or trial?
 - Do they have a current **curriculum vitae**?
 - History of **ethics** complaints or **arrests**?