



Child Custody Case Preparation Checklist

This is a simple child custody checklist to help you prepare for a consultation with an attorney or in preparation of filing a Request for Order for Custody and Visitation.

This is a preparation tool, not intended as legal advice.

1. Clarify Your Goals and Main Concerns

- ☐ Write down your ideal custody and visitation schedule with days and times.
- ☐ Are you seeking legal custody, physical custody, change in parenting time, temporary orders, or a modification of an existing order? It's important to clarify what you are going to ask for.
- ☐ What are your top custody concerns: school stability, medical needs, transportation, communication, safety, or missed visits.
- ☐ List only the facts. Keep your emotions out of it. Include specific dates, and examples.

2. Gather Court and Case Documents in Preparation of Filing

- ☐ Your attorney will need the following:
 - Copies of any existing custody, visitation, child support, restraining order, divorce, parentage, or guardianship orders.
 - Any petitions, responses, requests for orders, declarations, proofs of service, hearing notices, or mediation paperwork.
 - Documents showing any pending cases involving the child, including cases in another county or state.
- ☐ If you are filing on your own:
 - Local court forms or instructions that may apply in the county where the case is filed.

3. Organize Child-Related Records

Prior to filing you want to gather all evidence that will support or weaken your custody arguments:

- ☐ School records, report cards, attendance records, teacher communications,
and individualized education plans if applicable.
- ☐ Medical, dental, therapy, counseling, immunization, and prescription records.
- ☐ Extracurricular schedules, childcare information, and transportation arrangements.
- ☐ Records related to special needs, allergies, diagnoses, behavioral concerns, or other important care requirements.

4. Prepare a Parenting Plan Proposal

What do you propose is in your child's best interest as it pertains to their weekly schedule:

- ☐ Propose a regular weekly schedule, including school days, weekends, exchanges, and transportation.
- ☐ Include holidays, birthdays, school breaks, vacations, and special occasions.
- ☐ How parents will make decisions about education, health care, childcare, activities, travel, and religion if relevant.
- ☐ How would you like to communicate with the other parent?
 - Co-parenting app
 - Text messages
 - Email
 - Telephone
 - Combination
- ☐ Who can communicate with you about your children and when?

- Response times
- Names of Individuals
- What boundaries do you want set for communications?

☐ Frequency of sharing information about your children?

- Emergency contacts
- Information sharing.
- Medical/dental/mental health appointments
- Enrollment in extra curricular activities/educational activities
- School events

☐ What safety protocols and procedures would you like in place and why?

- Supervised visitation,
- Supervised exchanges
- Neutral location exchanges
- Other safety-related terms

☐ No alcohol

☐ No substances

☐ Exclusion of specific individuals during visitations and why.

5. Document Parenting History and Daily Involvement

☐ Create a timeline showing each parent's caregiving responsibilities, including
school drop-offs, appointments, homework, meals, bedtime, activities, and discipline.

☐ Keep a parenting calendar showing actual parenting time, missed visits, late
exchanges, and schedule changes.

☐ Save relevant communications about the child, including texts, emails, app messages, and voicemails.

- ☐ Collect receipts or records for child-related expenses, childcare, insurance, medical costs, extracurriculars, and transportation.

6. Identify Safety, Abuse, Substance Use, or Emergency Issues

List any safety concerns involving domestic violence, child abuse, neglect, threats, harassment, substance use, unsafe driving, weapons, or abduction risk.

- ☐ Gather police reports, restraining orders, medical records, child protective services documents, photographs, messages, or witness information if available.
- ☐ Note the date, location, people present, and effect on the child for each incident.
- ☐ If there is immediate danger, contact emergency services or a local crisis resource before waiting for a legal appointment.

7. Prepare for Mediation, Court, or Attorney Meetings

- ☐ Bring organized copies of key documents and keep the originals separate.
- ☐ Prepare a short summary of the case, the child's needs, current schedule, requested orders, and unresolved issues.
- ☐ Write down questions for the attorney or mediator before the meeting.
- ☐ Be ready to explain why your proposed plan supports the child's stability, safety, school routine, health, and relationship with each parent when appropriate.
- ☐ Confirm hearing dates, filing deadlines, service requirements, mediation appointments, and whether remote appearance rules apply.

8. Practical Organization Tips

- ☐ Create labeled folders for court papers, child records, communications, financial records, evidence, and proposed parenting plan.
- ☐ Use a simple index or cover sheet so documents can be found quickly.

- ☐ Keep communication with the other parent brief, child-focused, and respectful.
- ☐ Avoid posting about the case on social media
- ☐ Avoid discussing adult conflict with the child.

Ensuring the well-being of your children should always be a top priority, as life can change unexpectedly. If you are facing child custody decisions, our Child Custody Checklist is a valuable resource to help you prepare. [Contact our attorneys at Burgos Santoyo Smith](#), Family Law Attorneys, for a consultation to learn how we can support you and protect your family's best interests.