CHRISTIAN LEGAL AID OF THE DISTRICT OF COLUMBIA

ATTORNEY CHECKLIST

Before the Consultation

- ☐ When you're assigned to a client, identify the client and escort him or her to a meeting area. To ensure confidentiality, please call the client by last name (Mr. or Ms.) only.
- ☐ Introduce yourself, and explain that the clinic is generally limited to providing brief services, general information, and/or advice, although representation is occasionally provided.
- ☐ Make sure the client has read, understood, and signed the "Consent Form."
- ☐ Make sure the client has completed the client portion of the "Intake Form."
- ☐ Consider asking the client if he or she minded if you opened the meeting with a prayer.

During the Consultation

- ☐ Make note of the date, clinic site, and your name on the top right side of "Intake Form."
- ☐ Summarize the facts of the legal problem(s) in the "Notes" section of the "Intake Form" (if needed, use additional paper and attach it to the "Intake Form").
- ☐ Consider consulting your Clinic Director regarding the case and/or using CLADC's Dropbox Library or other online or print resources.
- ☐ Complete any brief services necessary to address the client's problem, including writing letters, making phone calls, drafting court documents, etc.
- ☐ If you'd like to obtain records from any third parties, ask client to execute a "HIPPA Release" or "General Release of Information."
- ☐ If you're going to provide any services after the conclusion of the consultation, make note of the nature of those services on the "Consent Form."
- ☐ Photocopy any documents that you have prepared for the client and attach them to the "Intake Form."
- ☐ If you're going to provide any services after the conclusion the consultation, note the nature of those services on the "Consent Form."
- ☐ Photocopy any documents provided by the client, or prepared for the client, and attach them to the "Intake Form."
- ☐ If applicable, complete the "Client Advice Form," make a copy for CLADC's file, and give the original to the client.
- ☐ Look for opportunities to encourage the client spiritually or even share the Gospel with him or her.
- ☐ Consider asking the client if he or she minded if you closed the consultation with a prayer.

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After the Consultation

- ☐ Complete the "Description of Follow Up after Consultation" section on pg. 2 of the "Intake Form."
- ☐ Give to the Clinic Director the "Intake Form" and "Consent Form," as well as copies of the "Client Advice Form," any executed releases, and any documents provided by or prepared for the client.