



## Checklist for APABA Community Legal Clinic Volunteer Attorneys & Law Students

Thank you for volunteering! We want to ensure uniformity and thoroughness in the Clinic and ask you to follow this checklist when assisting Participants. Each Volunteer Attorney & Law Student will be assigned a Participant based on your area of practice. To begin, you will be given an Intake Form.

### **Intake Form and Initial Procedures**

**\*Confidentiality:** *All information discussed and documents obtained in the course of your consultation is to be kept confidential. Never remove any case documents from the Clinic.*

- Review the intake form to ascertain who the Participant is and the purpose of the visit
- Greet the Participant and introduce yourself to him or her
- Explain to the Participant the parameters of your meeting:
  - You are not his/her attorney
  - This is not a confidential meeting
  - You are not providing legal advice, rather basic legal information
- Review the intake form with the Participant for completeness

### **Consultation with the Participant**

- Interview the Participant and identify his or her legal needs
- Provide legal information to address the legal need (**to be done by Attorney not Law Student**)
- If you are stuck:
  - Please ask other attorneys present who may have expertise
  - If no one is available, refer to the APABA Call List and call the attorney who may have expertise
  - You may also refer the Participant to the APABA Referral Sheet for government agencies, non-profit organizations and Lawyer Referral Service for the private bar. *Refrain from giving your business card or referring someone you know from the private bar.*

### **Concluding your meeting**

- Complete the back of the Intake Form with the basic facts of the case (**this can be completed by Law Student**), the legal information provided, and any follow-up that may be needed (**should be completed by Attorney**)
- Return the intake form to one of the clinic coordinators.
- If you need to do follow-up, please make a copy of the form to take with you.