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.