

FIRST APPOINTMENT CHECKLIST

Date Client Called: { ASK Date "Date Client Called?" \d " " } { ref Date * MERGEFORMAT }		Details taken by: { ASK Details "Client Details Taken By?" \d " " } { ref Details * MERGEFORMAT }	
Full Name:		{ MERGEFIELD LINKNAME_FORENAME_1 } { MERGEFIELD LINKNAME_SURNAME_1 }	
Address:		{ MERGEFIELD CALCULATION_ADDRESS }	
Telephone Home: { MERGEFIELD CALCULATION_PHONE }		Work:	
Mobile: { MERGEFIELD CALCULATION_MOBILE }		Email: { MERGEFIELD MATTER_EMAIL_ADDRESS }	
Date of Birth:	{ MERGEFIELD FW_CLI_INFO_EME_FW_CLI_DOB }	Conflict Check : Previously had free ½ hour:	YES/NO YES/NO
Employer:		{ MERGEFIELD FW_EMPLOYER_FW_EMPR_CO_NM }	
Address:		{ MERGEFIELD FW_EMPLOYER_FW_EMPR_MN_ADR }	
Start Date: { MERGEFIELD FW_EMP_TRMS_DTS_FW_EMP_START_DT }		Last day of Employment: { MERGEFIELD FW_EMP_TRMS_DTS_FW_EMP_TERM_DT }	
Brief Details of Matter:	{ MERGEFIELD MATTER_MATTER_DESCRIPTION }		
ORIGIN OF CLIENT: existing/recommended/CAB/Internet/Yellow Pages/Lloyd Green- News Quest/Other			
APPOINTMENT DETAILS:			
Date: { ASK Appdate "Client Appointment Date?" \d " " } { ref Appdate * MERGEFORMAT }		Time: { ASK Apptime "Client Appointment Time?" \d " " } { ref Apptime * MERGEFORMAT }	
Free ½ Hour/Private Client/LSC		(If app exceeds 30 mins charge £100 + VAT & then hourly rate)	
(Senior)	(4 yrs +)	(3-4 yrs)	(1-2 yrs)
			Newly qualified
			(Trainee)
			Paralegals
Advised: Bring in all documentation relating to the matter e.g. contract, wage slips, company handbook, correspondence with employer.			
ID to be provided: 1 photo ID & 1 address ID (no more than 3 months old) If no photo ID then two address IDs.			