

Confidential and Privileged Questionnaire for Employers

The purpose of this form is to provide us with basic information about your situation before your initial consultation. To make the best use of your time, please complete this form and e-mail, fax, or mail it to us prior to your consultation. Please supply all relevant documents, personnel handbooks, or other material related to your employment issue. An initial consultation typically lasts from 30 - 90 min. The consultation rate is \$300/hour for Amy Carlson, and \$375/hour for Richard Schramm. Time spent by the attorneys is measured in units of 0.1 hours. The fee is due and payable by cash, check, or credit card at the time of your consultation. By consulting with our attorneys, you are agreeing to pay our fees.

COMPANY DATA

Full Name:	Today's Date:
Name of Business:	Type of Business:
Business Address:	Business Phone:
City, State, Zip	No. of Employees:
*Personal E-mail:	Cell Phone:
Address to which you would like correspondence sent:	
City, State, Zip:	
<input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Incorporation <input type="checkbox"/> S-Corp <input type="checkbox"/> LLC <input type="checkbox"/> Other	

PROBLEM EMPLOYEE DATA

Are you consulting with our firm because of a problem employee? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Full Name of Employee:	Employee's Job Title:
Date of Hire:	Type of Problem:

COMMENTS



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TYPE OF EMPLOYMENT ISSUES

- | | | |
|---|--|---|
| <input type="checkbox"/> Lawsuit Filed | <input type="checkbox"/> Performance Problem | <input type="checkbox"/> Handbook/Policies |
| <input type="checkbox"/> Govt. Agency Claim | <input type="checkbox"/> Misconduct/Discipline | <input type="checkbox"/> Termination/Firing |
| <input type="checkbox"/> Attorney Letter/Demand | <input type="checkbox"/> Wage-Hour Issue | <input type="checkbox"/> Separation Package |

Please specify:

EMPLOYMENT PRACTICES

- Does your business have an Employee Handbook? Yes No Date Issued: _____
- Do you have other written employment policies or rules? Yes No
- Do you have posters at each employee location? Yes No
- Do you have a list of required documents for each employee file? Yes No

WE NEED THESE HUMAN RESOURCE SOLUTIONS

- | | |
|--|--|
| Posters: Guidance on required posters and work place notices. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Forms: Generating all documents needed when hiring / firing Employees. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Policies: Creating sexual harassment, computer use, proprietary-trade secret, travel policies. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Policies: Creating (or Updating) an Employee Handbook, at-will, discipline policies. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Contracts: Incentive pay, commission, bonus agreements | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Training: Sexual harassment training, illness and injury prevention, preventive measures to stop / limit potential employee claims and lawsuits. | <input type="checkbox"/> Yes <input type="checkbox"/> No |



EMPLOYMENT RIGHTS ATTORNEYS
Employment and Small Business Law

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Please create a detailed chronology (timeline) of events leading up to your present employee problem. You may add more pages if necessary. * Please see sample timeline on the next page.

CHRONOLOGY OF EVENTS (TIME LINE)

OTHER COMMENTS:

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This is an example of a time line of events. A well thought-out timeline helps the attorney get a sense of the people, events, and time frame for your employee issue. A date and one sentence summary of each significant occurrence is ideal.

SAMPLE CHRONOLOGY OF EVENTS (TIMELINE)

01/20/08	John Doe was hired as an Administrative Tech.
03/**/10	Gerry Smith became his supervisor.
05/**/10	Juanita Gomez became Gerry Smith's Manager.
08/**/12	John Doe first started having problems with Gerry Smith, when Gerry confronted him about missing important deadlines.
12/10/12	Gerry Smith gave John Doe his first bad performance review.
01/15/13	Juanita Gomez denied John Doe his 2012 bonus, based on Gerry Smith's negative performance review, even though John Doe achieved all the 2012 objectives.
05/10/13	Smith accuses John Doe of violating the policy on travel and poor performance.
07/01/13	John Doe met with HR and complained about Smith and Gomez not supporting him and falsely criticizing him.
09/01/13	HR asked for an investigation of the complaints.
10/10/13	Following an HR investigation, John Doe was put on a Performance Improvement Plan (90 days).
01/31/14	John Doe was terminated after Smith claimed that his performance during the 90 day PIP period was poor.
2/05/14	John Doe filed a complaint with the DLSE regarding his bonus.