Business & Technology Law Clinic Student Checklist

Client name____
Clinic Students____
Matter ____

- ☐ Attach this form to the file
- ☐ Fill out <u>all</u> fields on client tracking form
- ☐ Attach Client Agreement or check if question submitted via website.
- ☐ Attach website submission if applicable
- ☐ Initial contact with client
  - assess seriousness of client
  - determine nature of client issue
  - determine nature of work to be done for the client
- ☐ Record/attach all information necessary for completing file
  - Discussion with clients, emails, website submissions, etc.
- ☐ Research answer
- ☐ Complete reporting letter and any necessary documents
- ☐ Client reporting letter and any other work products must be proofread by all students in the group (initial client tracking form)
- ☐ Mentor approval of work product
- ☐ Provide response to Client
- ☐ Provide Clinic Coordinator with electronic copy of your reply for inclusion in the precedent database
- ☐ Follow up with client
- ☐ Submit file to Clinic Coordinator to close