CONFIDENTIAL INTAKE QUESTIONNAIRE[[1]](#footnote-1)

Lamberton Law Firm, LLC

PLEASE COMPLETE THIS INTAKE QUESTIONNAIRE AND RETURN IT TO CAL@LAMBERTONLAW.COM

First Name:

Middle Name or Initial:

Last Name:

Street Address:

City:

County:

State:

Zip:

Telephone Nos.:

Home:

Work:

Cell:

Fax:

Date of Birth:

Email:

Social Media (list all you use such as Facebook, Twitter, etc., and provide your login information):

**Your case is about:**

* Discrimination on the basis of:
1. Sex/Gender
2. Race
3. Pregnancy
4. Religion
5. Disability
6. National Origin
7. Age
8. Medical leave
9. Military service obligations
10. Criminal record information
* Retaliation for:
1. Complaining about discrimination
2. Supporting another person’s complaint about discrimination
3. Requesting a workplace accommodation for a disability
4. Filing a charge or complaint of discrimination with a government agency or in court
5. Blowing the whistle
6. Standing up to unethical or illegal corporate practices

**What happened to you?**

1. I was fired
2. I was forced to retire
3. I was not hired
4. I was not promoted
5. I was disciplined (e.g., written reprimand, suspension, demotion)
6. I received a negative performance evaluation
7. I was excluded from meetings, emails, and other communications
8. My supervisors treated me less favorably than other employees who did similar work
9. My co-workers shunned me
10. My job duties were changed
11. My employer reassigned me or made me do my work under less desirable conditions
12. I was subjected to harassment on the basis of my race, gender, age, disability, because I complained of discrimination/retaliation, etc.

**Your complaint is against:**

Name of current or former employer:

Address:

City/State/Zip:

Type of Business:

Telephone No.:

Number of employees:

Fewer than 15

16-100

101-500

More than 500

Date of hire:

Most recent position:

Date of Termination/Separation:

Last date worked:

Were you offered severance and if so, how much?

Did you sign a release?

Salary (or if hourly, provide your hourly wage and hours worked per week):

Bonuses:

Commissions:

Fringe benefits:

What are/were your job duties?

Supervisor:

Supervisor’s Supervisor:

Human resources contact:

You receive performance reviews every (6 months, year, etc.):

Last performance review date:

Results of performance review and ratings received:

Person(s) who provided, conducted, reviewed or approved performance review:

Describe your history of performance reviews (consistently exceeds expectations, meets expectations, needs improvement, etc.):

Identify all raises:

Identify all performance bonuses:

Identify all promotions (from what position to what position, dates of promotion, etc.):

Identify all special awards, recognitions or commendations received:

Do/did you have a written employment contract?

Do you have a non-compete or other such agreement?

Do you have an employee handbook?

If you submitted a resume to your employer, was the information you provided 100% accurate and correct?

If not, what information was not accurate or correct?

If you submitted an application to your employer, was the information you provided 100% accurate and correct?

If not, what information was not accurate or correct?

**Your Employment History**

Please identify the names and addresses of your last three employers. For each one, tell us the dates you were employed, your position, your final salary or wage, your job duties, whether you separated voluntarily or involuntarily, and the reason for your separation.

1.
2.
3.

**Your Education**

High School:

Graduation date:

College:

Course of study:

Years attended:

Degree obtained

Post graduate education:

Other course work or certifications:

**What Happened**

On what date did the employer take its most recent discriminatory or retaliatory action against you?

What reason(s) did your employer give for the action(s) it took against you?

Who gave you these reasons?

When?

Did the employer put its reasons in writing? If so, in what writings?

Did the employer ever change its reasons? If so, from what to what?

Are the employer’s reasons for its actions accurate? Explain why or why not.

Did you receive progressive discipline?

Does your employer have a progressive discipline policy?

Were you ever warned or disciplined?

For what?

Was the warning or discipline legitimate?

Why or why not?

Have your ever been placed on a performance improvement plan? When, for what reason, and what was the result?

**Chronological story of your case:** In a chronological order of events, using exact or approximate dates, please tell us your story from beginning to end. Use people’s names and job titles when referring to people. Tell us who did/said what to whom, where, when, who was present, and whether communications were verbal or in writing. Refer to any documents or communications that are part of your story. Use as much space as necessary.

Has anyone said anything or written anything that you feel is discriminatory? If so, tell us what the person said, who said it, when the said it, and the names of any witnesses.

Did you ever complain to or tell anyone in the organization about the actions that had been taken against you? If so, identify all such persons by name and job title, state specifically what you told them, when you told them, their responses, and what actions, if any, they took.

If you were discharged, were you replaced? If so, by whom? Please provide the person’s name, age, gender, race and qualifications.

If you were not hired for a position, was anyone hired? If yes, please provide the person’s name, age, gender, race and qualifications.

**“Comparator” evidence can be very helpful in cases like yours.**

Let’s assume, for example, that you are a sales representative and have been fired from your job. Your employer says it fired you because you were 20% behind your annual goal. You believe your employer is lying, and that the real reason it fired you is because you had complained about discrimination a few months earlier. You are aware of at least five other representatives with the same supervisor as you who came in 30% below goal, but were not fired or even disciplined. This kind of different treatment would help prove that your employer is lying about why it fired you and that its real reason for firing you is because you complained about discrimination.

1. If your employer says it fired you for “poor performance,” tell us about any other employees who did the same or similar work as you, and who shared the same supervisor, whose performance was the same or worse than yours, but who were not fired.
2. If your employer says it fired you for misconduct, tell us about any other employees who did the same or similar work as you, and who shared the same supervisor, and who engaged in the same or more serious misconduct, but who were not fired.
3. Whatever reasons your employer gave, tell us about any other employees who did the same or similar work as you, and who share the same supervisor, that the employer treated more favorably than you.

**Unemployment compensation**

Did you apply for unemployment compensation?

Reason you gave for why you are unemployed:

Did the employer contest the unemployment?

What reason did the employer give for separating you?

Did you have a referee hearing?

If yes, what was the result?

Is a referee hearing scheduled? If so, when and where:

**Documents and Electronically Stored Information**

Do you have any documents or electronic information (photos, emails, texts, spreadsheets, etc.) that you believe support your claims? If so, please identify and describe them here.

Have you kept any diaries or calendars related to your case? If so, please provide us copies along with your responses to this questionnaire.

Are you aware of any emails, notes, reports or documents in the possession of your employer that support your claims? Please identify them here.

**Witnesses**

It is generally important to have favorable witnesses who can support or corroborate your claims, and who are willing to provide a written statement. Please provide the complete contact information (name, phone, email) for all persons you believe would be favorable witnesses for you. For each witness, state whether they are a current or former employee, their job title, and what information they can provide.

1.
2.
3.

Identify by name, job title, email, phone number the witnesses you believe would be unfavorable to you and tell us what you believe each witness would say.

1.

2.

3.

**Prior legal proceedings**

Have you sought assistance in this matter from any Government agency, union, attorney, or any other source? If so, describe in detail.

Have you ever filed any charges relating to this employer with the EEOC, the PHRC, the PCHR or any other federal or state agency? If so,

1. When did you file your Charge?
2. With what agency?
3. Has the employer responded yet?
4. Have you filed a rebuttal?
5. Is your case still with the agency?
6. If not, when did the agency release your case?
7. Did the agency find Cause to believe your employer violated the law?
8. Did you receive a Notice of Right to Sue? If so, on what date?

Have you ever filed an EEOC Charge in the past? If so, please describe in detail.

Have you filed any prior lawsuits for any reason? If so, please describe in detail.

**Criminal history**

Have you ever been charged with and/or arrested for a criminal offense, including any summary, misdemeanor or felony offenses? If yes, identify the date of the charge(s) and/or arrest(s), the nature of the charges and the disposition of the charges, indicating whether the case was disposed of, in whole or in part via adjudication at trial, guilty plea, plea bargain, or other means.

**Job Search Efforts**

You have a duty to mitigate your damages. This means you must make reasonable efforts to obtain comparable employment such as by searching for employment online, searching employment ads, and actually applying for positions. It is very important that you be able to prove your efforts to find other employment. Please save copies of all ads you respond to, all cover letters you send, and all responses from potential employers. Also, please keep a list of all contacts you make in your job search, and the results of such contacts.

Describe in detail your job search efforts to date.

**Medical Information**

Have you suffered from emotional distress of any type as a result of the discrimination? If yes, please describe your symptoms.

Have you sought any medical attention? If so, please state:

Names and addresses of all medical providers:

Dates of treatment:

Diagnoses:

Medications:

Are you still treating with this person?

Check all of the following that have applied to you in the last three years:

\_\_\_\_\_ I have had a change in my family status caused by marriage, divorce or

 separation.

\_\_\_\_\_ There has been a death or serious illness in my family or someone close

 to me.

\_\_\_\_\_ I have had relationship problems.

\_\_\_\_\_ I have had marital problems.

\_\_\_\_\_ I have received marital or personal counseling.

\_\_\_\_\_ I have had legal problems.

\_\_\_\_\_ I have had dietary or health problems.

**DOCUMENT** **CHECKLIST** - Please send us copies, via email, fax or mail, of the following (do not send us your originals):

\_\_\_\_\_ Documents regarding any warnings or discipline you received

\_\_\_\_\_ Text messages, emails or other communications that you believe relate to your potential case

\_\_\_\_\_ Your performance evaluations

\_\_\_\_\_ Your resume

\_\_\_\_\_ Your Employee Handbook

\_\_\_\_\_ Your final W-2

\_\_\_\_\_ Your final pay stub

\_\_\_\_\_ Any release or other document you signed at the time of or after your

 termination

\_\_\_\_\_ All documents related to your unemployment compensation benefits

\_\_\_\_\_ All documents filed with or received from the EEOC
\_\_\_\_\_ All documents regarding your job search efforts

\_\_\_\_\_ All notes you made

\_\_\_\_\_ Any medical records for treatment or counseling you have received in

 connection with your employment matter

1. In submitting this Questionnaire and the enclosed copies of documents for review, I understand the Lamberton Law Firm has not yet made a decision to represent me, has not yet rendered any opinion on my matter, and that it may take an unspecified amount of time for the Lamberton Law Firm to complete its review of my materials. I understand and agree the Lamberton Law Firm is not responsible to file anything or take any action on my case, and will not represent me for any purpose until and unless a separate written retainer agreement is mutually executed. I understand there are time limits involved in legal and administrative proceedings, and agree that I alone assume the risk that such limits may run before the Firm’s review is completed. I agree that the Lamberton Law Firm is not responsible to meet such deadlines or to file anything on my behalf to meet such deadlines. [↑](#footnote-ref-1)