**New Client Intake Form**

**Date**:

**Name**:

**Email**:

**Phone**:

**Address**:

**City/State/ZIP**:

**Time Zone**: **Reporter Type:**

Eastern  Freelance

Central  State Official

Mountain  Federal Official

Pacific **Service Requested:**

Alaska  Scoping

Hawaii  Proofreading

**PLEASE** **SIGN HERE \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** acknowledging that you have read and agree to my Rates and Policies, a copy of which has been provided to you below. By engaging my services, you implicitly agree to my rates and policies.

**Please return the completed and signed form to**: [contact@scopist4u.com](mailto:contact@scopist4u.com)

**RATES AND POLICIES**

**Confirm Availability**

* Please send an email to [contact@scopist4u.com](mailto:contact@scopist4u.com) with your page count and requested turnaround.
* To avoid missed deadlines, please be explicit with your required return date and time.
* Please wait for confirmation of my availability to accept the job before proceeding.​ ​
* If you do not receive an email response within an hour or if you feel you must reach me, feel free to text me at 847-271-1770. ​

**Prepare Your Transcript**

* Before submitting your transcript to be scoped, please prepare your rough notes by defining excessive untranslates, identifying speakers, and addressing any areas/hotspots you may have flagged for yourself to check and clean up.
* If you have spellings of names and terms used in the transcript, please provide a list so I do not need to spend unnecessary time researching spellings may you already have.
* Transcripts with an inordinate amount of untranslates, mistranslates, and drops may be returned to the reporter for cleanup or may incur an additional charge.
* Before submitting your transcript to be proofed, it should be scoped, spell-checked, and as close to turn-in ready as possible.

**Send Your Transcript**

* Send your transcript via your preferred file transfer method, e.g., Dropbox, SendThisFile, etc.
* When I receive your transcript, I'll send a confirmation email with the job name, page count, and due date/time.
* Please double-check this email to verify you've sent the correct transcript and confirm the page count and agreed upon return date and time are correct.

**Communication and Expectations**

​A successful working relationship depends on open communication and clearly-defined expectations from both parties.​

* Please be upfront with your requirements and be willing to answer questions and provide feedback if necessary or requested.
* Please let me know if you've had a bad writing day as your transcript may require more time to scope. I normally will not upcharge regular clients for an occasional bad writing day. An occasional bad writing day is sometimes unavoidable, therefore, I will not intentionally add to that aggravation if you have taken the time to notify me in advance of the same.
* If you have preferences not covered on my Preference Sheet, special requests, or any other specific concerns you'd like addressed on your transcript, please provide those in a separate email.

**Receive and Review Your Transcript**​

* Please confirm receipt of your transcript even if you have not had time to review it.​
* When reviewing your scoped or proofed transcript, be sure to look for any asterisks, flagged areas, and hidden notes or comments I may have inserted.
* Please let me know promptly if you have any questions or concerns about your transcript so I can respond appropriately.

​  
**Submit Your Payment**

* Payment is accepted via PayPal or Zelle.
* At this time, I do not accept payments by credit card or check.​ When required, agency checks can be accepted after a regular working relationship has been established, however, it is not my preferred method of payment.

**Your Opinion Matters**

* Your feedback is taken seriously and is used to improve the services I provide.​

​**​**