

Employment Law Intake Script for Bush & Bush Law Group

Introduction and Warm-Up

- **Intake Specialist:** "Hello, thank you for contacting Bush & Bush Law Group. My name is (Intake Specialist's Name). I'll be assisting you today. What type of legal help are you searching for? May I start by confirming your name, phone number and email in case we get disconnected?" Th
 - **Client Response:** *[Client provides legal information, name and contact information.]*
- **Intake Specialist:** "Thank you! I'd like to gather some details about your situation so our legal team can better understand your needs. This should take about 10 minutes. Is that alright?"
 - **Client Response:** *[Client confirms they're ready to proceed.]*

Employment Information

- **Intake Specialist:** "Let's go over some details about your employment. Could you tell me your employer's name and address?" *(If they don't feel comfortable giving information, please inform them we will not reach out to their employer or give any information they disclose to us in this conversation, we would like to have a better understanding of their case to give them most accurate information.)*
 - **Client Response:** [Client provides employer's name and address.]
- **Intake Specialist:** "What is your job title, and when did you start working there?"
 - **Client Response:** [Client provides job title and start date.]
- **Intake Specialist:** "Is your employment still active, we're you terminated or did you leave? If it has ended, could you let me know the date?"
 - **Client Response:** [Client provides current status or end date.]
- **Intake Specialist:** "Are/Were you working full-time or part-time?"
 - **Client Response:** [Client indicates full-time or part-time.]
- **Intake Specialist:** "Are you classified as an employee, independent contractor, or temporary/seasonal worker?"
 - **Client Response:** [Client provides employment classification.]
- **Intake Specialist:** "What is your current annual salary with the company" if they are hourly write down hourly wage.
 - **Client Response:** [Client describes job duties.]

Reason for Seeking Legal Help

- **Intake Specialist:** "Could you tell me what type of employment issue you are experiencing at work in as much detail as you feel comfortable? *(If this is a woman who may have experienced sexual harassment/ assault, please offer the opportunity for them to speak with a female intake specialist.)* Make sure you inform the next intake specialist of all of the information so the PNC is not repeating the same process. Discrimination Race/Gender/Age/
 - **Client Response:** [Client lists applicable issues and explains briefly, if desired.]

Statute of Limitations

- **Intake Specialist:** "To make sure your rights are protected, it's important to note that there are deadlines, called the statute of limitations, for filing employment claims. These timelines vary depending on the specific issue, so our attorneys will review this with you in detail. When did the incident or issue first occur?"
 - **Client Response:** [Client provides date and related details.]

Incident Information

- **Intake Specialist:** "Can you tell me the location of the incident?"
 - **Client Response:** [Client provides the location.]

Employer Actions

- **Intake Specialist:** "Have you reported this incident to your employer, HR, or Supervisor?"
 - **Client Response:** [Client indicates Yes or No.]
 - If Yes:
 - **Intake Specialist:** "When did you report it, and how did they respond?"
 - **Client Response:** [Client describes reporting timeline and employer's response.]
 - If No:
 - **Intake Specialist:** "Thank you for sharing that; we understand every situation is unique."
- **Intake Specialist:** "Have you taken any further action, like filing a complaint with HR or a government agency?" Examples: EEOC or Texas Workforce Commission
 - **Client Response:** [Client indicates any additional steps taken.]

8. Retaliation or Adverse Actions

- **Intake Specialist:** "Since reporting or experiencing this issue, have you experienced any **retaliation** or adverse action from your employer?"
 - **Client Response:** [Client indicates Yes or No.]
 - **If Yes:**
 - **Intake Specialist:** "Could you describe what happened?"
 - **Client Response:** [Client explains any retaliatory actions.]

9. Wage and Hour Issues (If Applicable)

- **Intake Specialist:** "Regarding wages, have you been properly paid for all hours worked?"
 - **Client Response:** [Client indicates Yes or No.]
- **Intake Specialist:** "Are you owed any overtime pay?"
 - **Client Response:** [Client indicates Yes or No.]
- **Intake Specialist:** "Were you paid for your breaks?"
 - **Client Response:** [Client indicates Yes or No.]
- **Intake Specialist:** "If there are any other wage-related issues, please feel free to describe them."
 - **Client Response:** [Client explains any other wage issues.]

10. Medical and Disability Information (If Applicable)

- **Intake Specialist:** "Have you requested any reasonable accommodation due to a disability or medical condition?"
 - **Client Response:** [Client indicates Yes or No.]
 - **If Yes:**
 - **Intake Specialist:** "Could you briefly describe the condition and the accommodations requested?"
 - **Client Response:** [Client provides relevant details.]
 - **Intake Specialist:** "Has your employer denied any of these requests?"
 - **Client Response:** [Client indicates Yes or No.]

11. Legal Representation and Documentation

- **Intake Specialist:** "Have you previously consulted another attorney about this issue?"
 - **Client Response:** [Client indicates Yes or No.]
 - **If Yes:**
 - **Intake Specialist:** "Please provide any relevant details, if you can."
 - **Client Response:** [Client shares previous consultations or actions.]
- **Intake Specialist:** "Do you have any relevant documentation, like pay stubs, emails, performance reviews, or medical records, text messages, videos? If so, could you provide a list of what you currently have?"
 - **Client Response:** [Client lists available documentation.]

Explanation of Pre-Litigation and Litigation Process

- **Intake Specialist:** "Thank you for providing all this information. I'd like to give you a quick overview of what our process may look like moving forward."
 - **Pre-Litigation:** "First, we'll typically begin with a pre-litigation process, where we try to resolve the matter without filing a lawsuit. This may involve negotiating with your employer, filing claims with agencies such as the EEOC or Department of Labor, and gathering all necessary evidence. Many cases are successfully resolved in this phase."
 - **Litigation:** "If we're unable to reach a fair agreement through negotiation, the next step is litigation, where we would formally file a lawsuit. This process may involve filing motions, gathering witness statements, and possibly going to trial. Our attorneys will guide you through each step to help you understand what to expect."
 - **Statute of Limitations Reminder:** "As we move forward, we'll also keep the statute of limitations in mind, as filing deadlines are critical in employment law cases."

13. Other Information

- **Intake Specialist:** "Could you let us know how you heard about Bush & Bush Law Group?"
 - **Client Response:** [Client provides referral source.]
- **Intake Specialist:** "Is there any other information you feel would be helpful for us to know about your case?"
 - **Client Response:** [Client shares any additional case details.]

14. Wrap-Up

- **Intake Specialist:** "Thank you very much for sharing all these details. I'll make sure this information gets to our legal team, who will review your case and get back to you as soon as possible. If you have any additional questions or documents to share, please don't hesitate to reach out."
 - **Client Response:** [Client acknowledges and thanks Intake Specialist.]
- **Intake Specialist Closing:** "We're here to support you, and we appreciate your time and trust in Bush & Bush Law Group. Thank you, and take care."