

LEGAL ASSISTANCE CLIENT INTAKE QUESTIONNAIRE



PRIVACY ACT SENSITIVE: Any misuse or unauthorized disclosure may result in both civil and criminal penalties.
PRIVACY ACT STATEMENT: AUTHORITY 5 USC 301, Departmental Regulations; 10 USC 1044; and 32 CFR Part 727, Legal Assistance.
ROUTINE USE(S): Information provided is used to provide an administrative record for use by attorneys and clerical personnel directly involved in providing legal assistance, to manage internal counsel assignment, and for internal management of the office, to include generating periodic workload productivity and statistical reports.
MANDATORY/VOLUNTARY DISCLOSURE CONSEQUENCES OF REFUSAL TO DISCLOSE: Disclosure of requested information is voluntary, but failure to provide such information may limit the Legal Assistance Office's ability to provide assistance.

Receiving services from a non-attorney at the Legal Assistance Office does not create an attorney-client relationship. In order to form an attorney-client relationship you must meet with an attorney. The attorney-client relationship will terminate when the attorney's involvement in the current case ends.

First Name		Middle Name		Last Name		Maiden Name (if applicable)	
Street Address:				City:		State:	
DOD ID #:		Cell Phone:		Birth Date:		Email:	
<input type="checkbox"/> Male	<input type="checkbox"/> Active Duty	<input type="checkbox"/> Dependent		Name of Spouse (include maiden name in parentheses)			
<input type="checkbox"/> Female	<input type="checkbox"/> Reserve/Guard	<input type="checkbox"/> Other (Explain):					
<input type="checkbox"/> Retiree							
Military Information for Self or Spouse/Sponsor							
<input type="checkbox"/> Marine Corps	<input type="checkbox"/> Air Force	<input type="checkbox"/> Coast Guard		Rank/Rate:		Unit	
<input type="checkbox"/> Navy	<input type="checkbox"/> Army	<input type="checkbox"/> DoD Civilian					
Are you currently represented by a civilian attorney or have you seen a Military Legal Assistance Attorney before?							Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, what is the attorney's name?							
Have you received services from this Legal Assistance office before?							Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, what services did you receive?							

ADVERSE OR OPPOSING PARTY INFORMATION ***THIS MUST BE FILLED OUT***

First Name		Middle Name		Last Name		Maiden Name (if applicable)	
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-OR-

Name of Business:							
Street Address:				City:		State:	
						Zip:	

CONSENT TO DISCLOSE CONFLICT

If an opposing party is entitled to Legal Assistance and comes into our office, we cannot represent that person if you have formed an attorney-client relationship here. It will then be necessary to tell the opposing party or any conflicted party that this office represents you and cannot represent them. Do you consent to this office disclosing that we represent you?							Yes <input type="checkbox"/> No <input type="checkbox"/>
Signature: _____ Date: _____							

FOR OFFICE STAFF ONLY

ID CARD SCREENED <input type="checkbox"/>		CONFLICT CHECKED <input type="checkbox"/>		CLERK NAME: _____ SIGNATURE: _____	
ASSIGNED ATTORNEY NAME AND RANK:			ATTORNEY REVIEWED CMS CASE FILE: <input type="checkbox"/> CMS REVIEWED		ATTORNEY SIGNED:

What issue will you be discussing in your appointment? Check all that apply and circle applicable issues.

- ADOPTION OR NAME CHANGE**
- CONSUMER ISSUE:** Auto or other purchase or sale, auto/house repair, credit or collection problem, bankruptcy
- DOMESTIC RELATIONS:** Support; custody; guardianship; divorce; annulment; paternity
- IMMIGRATION:** Naturalization; citizenship; resident permit; visa; employment
- MILITARY RIGHTS & BENEFITS:** Servicemembers Civil Relief Act; Uniformed Services Employment and Reemployment Rights Act; Other
- POWER OF ATTORNEY:** Includes Health Care Surrogate
- REAL ESTATE OR LANDLORD TENANT:** Purchase/Sale; lease; rental; security deposit; eviction
- TAX:** Income, sales, intangible, property, ad valorem. If it is to prepare a return during the tax season, go to the Tax Center
- WILLS OR ESTATE PLANNING:** Wills, living Wills, trusts, Medicaid, elder law, estate tax, probate
- CRIME VICTIM ASSISTANCE:** Need referral to Victims' Legal Counsel
- OTHER ISSUE:** (explain) _____

Please provide a summary of your legal situation:

LIMITED SCOPE OF REPRESENTATION

10 U.S.C. sec. 1044 allows military legal assistance offices to provide eligible persons legal assistance concerning their personal civil affairs. This authority is implemented in the Department of the Navy through JAGINST 5800.7F, Manual of the Judge Advocate General and, in the Marine Corps, through MCO 5800.16, Legal Support and Administration Manual.

Consequently, there are some services that this office may not provide. To ensure that you are fully aware of those limitations, please read the following:

1. The legal assistance office may only provide assistance regarding personal civil matters. It does not provide advice or assistance in business matters or for organizational support.
2. The legal assistance office does not produce complex estate planning documents to include: complex wills for persons with assets exceeding the federal estate tax exemption; inter vivos "living" trusts; or special needs trusts.
3. Due to the level of expertise required for certain matters, the legal assistance office provides only basic advice and counseling on bankruptcy and tax law.
4. The legal assistance office does not provide real estate services such as title examinations, titling opinions, or real estate closings.
5. The legal assistance office does not file appearances as an attorney of record, or represent clients before courts or administrative/regulatory agency boards, unless representation is authorized in an Expanded Legal Assistance Program (ELAP). Availability for ELAP representation is extremely limited.
6. With certain exceptions for victims of crimes, the legal assistance office does not provide advice or assistance regarding the following: federal/state/foreign criminal proceedings; courts-martial; non-judicial punishment; administrative separation proceedings.
7. Pursuant to 18 U.S.C. § 205, the legal assistance office is prohibited from providing advice or assistance in any matter in which the United States Government is either a party or has a substantial interest in the outcome, whether or not its interests are adverse to the client.
 - a. The limited exceptions to this include personal tax advice, assistance through administrative/fiscal channels regarding a client's indebtedness to the U.S. Government or military pay matters, and other matters specifically approved by the Staff Judge Advocate to the Commandant of the Marine Corps.
 - b. The following are examples of matters in which the U.S. Government has an interest in which advice or assistance cannot be provided:
 - (1) Prosecution of any tort, military, personnel, TRICARE, or other monetary claim against the U.S. Government or any defense of such claim.
 - (2) Regarding an official criminal investigation or administrative investigation of the Department of Defense or any agency therein in which the individual seeking assistance is a party, witness, or subject of such investigation, with certain exceptions for victims of crimes who are otherwise eligible for legal assistance.

(3) Administrative complaints under Article 138 of the Uniform Code of Military Justice, or Section 1105 of the Navy Regulations, petition for relief to the Board for Correction of Naval Records or Naval Discharge Review Board, or rebuttal of a fitness report or evaluation.

(4) Civil Rights, Constitutional, or Employment complaints against the U.S. Government. This does not prohibit general advice to Reservists concerning the Uniformed Services Employment and Reemployment Rights Act (USERRA).

8. If two or more eligible persons with conflicting interests seek advice from this office, the party first establishing an attorney-client relationship will be provided representation.

Signature and date



UNITED STATES MARINE CORPS
LEGAL SERVICES SUPPORT TEAM PARRIS ISLAND
LEGAL ASSISTANCE OFFICE
286 PANAMA STREET
PARRIS ISLAND, SOUTH CAROLINA 29905

**REQUEST TO RECEIVE REMOTE LEGAL ASSISTANCE SERVICES
AND
CONFIDENTIALITY DISCLOSURE**

As a party eligible for legal assistance (LA) services from Parris Island Legal Assistance, I hereby request to receive those services by remote means. This may include discussion and communications with LA attorneys and support staff using the telephone, electronic mail (email), internet programs or other means conducted in place of face-to-face consultations. I am seeking support via these remote means as a matter of personal convenience or necessity, and understand that I may schedule a face-to-face meeting with LA legal assistance providers if I desire to do so by calling the Legal Assistance Appointment Desk at (843) 228-2559.

I understand that the confidentiality of all my communications with LA personnel is of utmost importance to the LA Office. It is the policy and practice of this office that the confidentiality of all my private information and case-related matters be protected from improper disclosure in every possible manner and at all times. I understand that all personnel assigned to the LA Office (military and civilian attorneys, paralegals, and support staff) are governed by this confidentiality requirement and may not discuss my private client information outside the scope of their official duties or disclose my private client information to third parties without my permission or as otherwise required by law.

While I understand the confidentiality requirements regarding my case, I also understand that accessing legal assistance services via remote means subjects my communications with LA personnel to possible interception or discovery by third parties. While LA personnel will take all reasonable measures to protect my private information, the LA Office cannot control or guarantee absolute privacy of communications made via telephone, cell phone, email, internet, or any other electronic communication systems not operated by the LA Office. While the risk of any intercept may be low, it is a risk I accept in seeking legal assistance support through these remote means.

I also understand that the presence of any third party I allow to be present or participate in my communications with LA providers may compromise the privacy of my information and any underlying "attorney-client privilege" I may form with those providers. A third party (to include a roommate, co-worker, friend, spouse, or parent) is not bound by any rules of confidentiality and could relate my information for any purpose to any other parties.

I am advised that I have the opportunity to discuss these issues with a LA provider prior to my disclosure of any confidential information or the execution of legal assistance support by remote means. By signing below, I acknowledge that I have read and understand this disclosure, have discussed any confidentiality concerns with a LA provider, and desire the provision of legal assistance services by remote means.

Signature

Date

Printed Name

MEMORANDUM

From: Attorney, USMC
To: Legal Assistance Client

Subj: TOOLS TO COPE WITH STRESS

1. Legal troubles are often very stressful, but there a number of healthy ways to cope with this stress. Several resources are readily available to help you overcome the stress and uncertainty that you may be experiencing. I have listed some of the options below. We will discuss these options today and you should know that not all of the services that are available from the various sources provide you with confidentiality; however, if you are having difficulties dealing with stress or having thoughts of suicide, you need to seek help from a qualified individual right away.

a. **National Suicide Prevention Lifeline (NSPL)** is a nationwide network of crisis centers. If you are ever feeling desperate, alone, or hopeless, you can call the NSPL at **1-800-273-TALK (8255)**¹. NSPL is a free, confidential, 24-hour hotline available to anyone in suicidal crisis or emotional distress. <http://www.suicidepreventionlifeline.org/>

b. **Outpatient Mental Health Clinic (643-7722)** provides licensed psychologists, psychiatrists, and social workers. In addition to you seeking services on your own initiative, if certain individuals, including members of your chain of command or me, believe that you are a danger to yourself, we can recommend to your commander that you be referred for a mental health evaluation.

c. **DStress Line** is available to active duty, Reserve, families, loved ones, and former Marines who are located in certain areas. The line provides counseling for any stress related issues including work, personal, relationship, financial, and family. It is available 24 hours a day, seven days a week and is staffed with former Marines. The service is free and confidential. **1-877-476-7734**¹.

d. **Military One Source (MOS)** provides telephonic, online and face to face counseling. MOS is provided by DoD at no cost to active duty, Reserve, and their families. The service is private and confidential; however, your identity must be verified for their internal records only. **1-800-342-9647**¹ <http://www.militaryonesource.com/MOS/About/CounselingServices.aspx>

e. **Chaplains/Clergy** have confidentiality and are trained to help you with the problems you are facing, including spiritual counseling. There is an absolute privilege for all information confided in a chaplain or clergy as a formal act of conscience or faith.

2. **REMEMBER: You are a valuable person and a member of the Marine Corps Family and we are committed to providing you services and support during this stressful time.** If you are having issues, please do not hesitate to ask for help. I can help you get in contact with a qualified counselor or you can seek help directly. If you have any questions concerning this information, please call me at 645-3075.

CLIENT SIGNATURE OF UNDERSTANDING

¹ Dialing a toll free number from a government landline is easy. Just start dialing with the 800 or 877. There is no need to dial any number before the 8.



UNITED STATES MARINE CORPS
LEGAL ASSISTANCE OFFICE
LEGAL SERVICES SUPPORT TEAM
MARINE CORPS RECRUIT DEPOT
172 SANTO DOMINGO ST., BUILDING 172
PARRIS ISLAND, SC 29905-9610

NOTICE OF REPRESENTATION

I, _____, have acquired legal representation from the Legal Assistance Office, Legal Services Support Team, Marine Corps Recruit Depot, Parris Island, South Carolina. I authorize my attorney, _____, to speak on my behalf concerning my case. Please make all information regarding my case accessible to my attorney, _____, Legal Assistance Attorney, at (843) 228-2559 or fax (843) 228-4488.

Signature

Print Name

Date



UNITED STATES MARINE CORPS
LEGAL SERVICES SUPPORT TEAM PARRIS ISLAND
LEGAL ASSISTANCE OFFICE
286 PANAMA STREET
PARRIS ISLAND, SOUTH CAROLINA 29905

REMOTE SERVICES CONFIDENTIALITY DISCLOSURE

It is the policy and practice of the Legal Assistance Office (LAO) that the confidentiality of all client information and related matters is protected in every possible manner and at all times. Individuals who seek legal assistance services from the LAO do so under an attorney-client relationship that is limited in duration and scope to specific and discreet legal matters. Our professional and ethical obligations require us to ensure confidentiality is protected. All personnel assigned to the LAO fall under this confidentiality requirement and may NOT discuss any matters outside of the office, including the names of prospective, actual or former clients, specific legal matters that an individual is seeking assistance for, and any specific matter or outcome that may occur in an individual case, unless authorized to do so with the client's permission or otherwise authorized under the law.

I understand this means that while I am receiving legal assistance services via remote means (i.e., telephonically, Defense Connect Online (DCO), e-mail, or other means not conducted face-to-face in the LAO office), the above confidentiality also applies. I further understand that the use of technology to communicate with LAO personnel carries an inherent risk of third party interception. Although the LAO will take all reasonable measures necessary to ensure privacy in remote attorney-client communications, the LAO cannot guarantee privacy as remote communications rely upon providers outside of the Department of Defense (i.e., cell phone signals/providers, NMCI or commercial internet provider, or any other electronic medium).

I also understand if any unauthorized or nonessential third party is present or can overhear any portion of the conversation, confidentiality and the applicability of the attorney-client privilege may be compromised. In other words, parties outside of the LAO are not bound by ethical rules to maintain the confidence of the communication.

By signing below, I acknowledge that I understand this disclosure and have had the opportunity to discuss this with a Legal Assistance attorney before commencing any confidential discussions. I consent to receiving legal advice by remote, electronic means and that the LAO will take all precautions within its control to ensure the confidentiality of our communications.

Signature

Date