

**INTAKE FORM: Lawsuit Defendant**

What would you do if you were served with a summons and complaint showing that a former employee is suing you for wrongful termination? Hopefully, you know that you should hire an attorney immediately. Look for an attorney with good negotiation skills and litigation experience. You might have worked with an employment lawyer in the past—start by asking him or her to review the lawsuit documents. Whether the attorney is new or someone you’ve dealt with for a long time, you will probably be asked to provide the following information:

**EMPLOYER INFORMATION**

What is your company name? \_\_\_\_\_

Address? Telephone number? \_\_\_\_\_

E-mail address? Web page site? \_\_\_\_\_

What is your title and role in the business? \_\_\_\_\_

Who is an alternate contact there? \_\_\_\_\_

What is your company’s corporate form? \_\_\_\_\_

What kind of business do you do? \_\_\_\_\_

Who is your liability insurer? \_\_\_\_\_

Who is your insurance agent? \_\_\_\_\_

Address? Telephone number? \_\_\_\_\_

What is your insurance policy number? \_\_\_\_\_

What kind of coverage do you have? \_\_\_\_\_

**GENERAL EMPLOYEE INFORMATION**

How many employees does your company have? \_\_\_\_\_

What kind of work do your employees do? \_\_\_\_\_

How many departments at your company? \_\_\_\_\_

How many managers/executives? \_\_\_\_\_

How many of your employees are unionized? \_\_\_\_\_

Which unions are represented? \_\_\_\_\_

What is the total payroll? \$ \_\_\_\_\_

What portion of the payroll is for unionized employees? \$ \_\_\_\_\_

In percentages, how long have your employees been with the company?

0-6 months \_\_\_\_\_%

6 months to 1 year \_\_\_\_\_%

1-3 years \_\_\_\_\_%

4-5 years \_\_\_\_\_%

More than 5 years \_\_\_\_\_%

Did you provide employees with an employee manual? \_\_\_\_\_

**INFORMATION ABOUT PLAINTIFF**

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Was this an exempt position? \_\_\_\_\_

Salary: \_\_\_\_\_

Brief description of benefits package: \_\_\_\_\_

Did the company have a contract with Plaintiff? \_\_\_\_\_

Date of hire: \_\_\_\_\_

Date of termination: \_\_\_\_\_

Is Plaintiff a union member? \_\_\_\_\_

If so, name of Union, local, and agent: \_\_\_\_\_

Plaintiff's Attorney's name: \_\_\_\_\_

Attorney's address: \_\_\_\_\_  
\_\_\_\_\_

Attorney's telephone and fax numbers: \_\_\_\_\_

Attorney's electronic mail address: \_\_\_\_\_

**INFORMATION ABOUT THE LAWSUIT**

What is the nature of the lawsuit? \_\_\_\_\_

Who has Plaintiff sued (the company and/or individuals)? \_\_\_\_\_

Did Plaintiff file a formal grievance prior to bringing suit? \_\_\_\_\_

If so, what was the outcome of the grievance proceedings? \_\_\_\_\_

Did Plaintiff complain informally about these issues? \_\_\_\_\_

If so, what was the response to his/her complaints? \_\_\_\_\_

Are there other employees in Plaintiff's position or with similar grievances?  
\_\_\_\_\_

In as much detail as you can provide, describe the issue that is the subject of Plaintiff's lawsuit from your perspective, including defenses of which you may be aware:

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\_\_\_\_\_  
\_\_\_\_\_  
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