NJSBA PRACTICEHQ

HOW TO CREATE A CLIENT INTAKE FORM

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No matter your practice area, collecting information from your clients upfront is essential. Nearly all representations require names, addresses, and contact information, while some require much more. While your practice area will determine the contents and length of your client intake form, every lawyer can benefit from having one.

WHAT INFORMATION DO YOU NEED?

Start by thinking about the information you need upfront. Begin with the information required to add the client and open the matter in your time, billing, accounting, and law practice management systems. From there, consider anything critical to know from the outset. For example, in family law, you will probably need to know the marriage date, date of separation, children's names, and dates of birth. In estate planning, you'll need to know if the client is married and the names of the spouse, children, other beneficiaries, and fiduciaries.

HOW DO YOU ORGANIZE IT?

Creating a user-friendly intake form requires organizing questions into groups. Group related questions together: client name and contact information can go into one group, while spouse information can go into another. As you group the questions by topic, you may realize that some groups are inapplicable to specific clients; unmarried clients don't need questions regarding their spouse, and clients without children don't need questions regarding their children.

If a significant portion of the questions are inapplicable to some clients, consider hiding those questions from clients who don't need to answer them. The fewer irrelevant fields your clients see, the more likely they are to finish the intake form. How you hide those questions depends on the method you use to create and disseminate your client intake form.

HOW DO YOU CREATE IT?

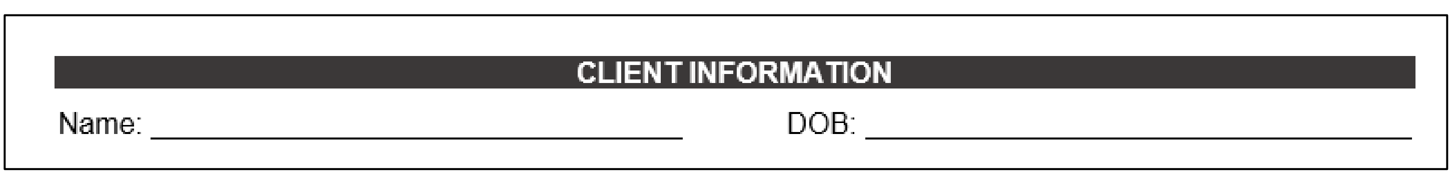
There are numerous ways to create a client intake form, each with advantages and disadvantages.

MICROSOFT WORD DOCUMENTS

One of the simplest methods is to create a Word form. It can be as simple as typing your questions and a blank line for each one. Here are some tips to make it easier to maintain and fill out:

DIVIDERS

Use dividers to break the questions into groups. Consider using shading on the divider headings to visually break up the groups.


CLIENT INFORMATION

Name: ______________________ DOB: ______________________

STYLES

Using styles to control formatting helps ensure consistency throughout the document. Set up a style for headings, sub-headings, and questions that require different formatting.

TABS

Set the location of tabs and use underlined tabs to create blank lines. This ensures all lines are the same length and won't grow longer as the client types.

TABLES

Use tables to line up questions and create blank lines. Be sure to uncheck the box to automatically resize to fit content in the table properties.

You can find more about Microsoft Word here.

FILLABLE FORMS

Take your form to the next level with fillable fields. Enable the Developer ribbon in Word to insert text boxes, checkboxes, dropdown lists, and more. Restrict editing to fillable fields to allow clients to tab through the fields quickly.

DIFFERENT INTAKE FORMS FOR DIFFERENT FACT PATTERNS

You may need to create different intake forms for different fact patterns to avoid numerous inapplicable questions. Start with an intake form with all your questions, then copy it and delete the irrelevant questions for a particular fact pattern.

A WORD OF WARNING

While sending out a Word intake form is leaps and bounds better than asking everything in an initial consult, there are better, more polished ways to send out intake forms. At the very least, consider converting your form to a fillable PDF to give it a more professional feel.

PDF FILES

START WITH WORD

Creating a PDF starts with Word. Follow the tips above to create a well-formatted intake form (or forms). Do not print out and scan the intake form; export the intake form to PDF from Word. Exporting the intake form from Word improves PDF quality and greatly reduces file size compared to printing and scanning.

AUTOMATICALLY FIND FILLABLE FIELDS

Many PDF software programs can automatically detect form fields and make them fillable. If your software has that feature, start by taking advantage of it.

CREATE NEW FIELDS

Even if your PDF software can automatically detect fields, you may still need to create new fields. Add new text fields, checkboxes, radio buttons, and dropdown lists as required.

SET TAB ORDER

Once all the fields are added, set the tab order. The tab order controls the order in which the fields are completed when a client uses the tab key to advance from one field to the next.

POLISH FIELDS

Polish the fields by opening the field properties and improving the field names and hover text. Group radio buttons together by giving them the same field name. Grouping them ensures that your client can only select one of the radio buttons options in a group.

ADD A SUBMIT BUTTON

Add a submit button that emails the completed form back to you to make it easy for clients to send it back to you.

You can explore Adobe Acrobat for PDF editing here.

ONLINE FORMS

Creating online intake forms using a survey tool, such as Microsoft Forms, Google Forms, or SurveyMonkey, can be even easier than creating a Word or PDF intake form. With online forms, there is less to worry about when it comes to formatting - you merely need to type your question and select the appropriate answer type (typically a textbox, radio buttons, or checkboxes).

CONDITIONAL QUESTIONS

Some online forms allow you to show/hide questions conditionally. If you ask upfront if the client is married or has children, you can then control whether questions related to the spouse or children appear later. Setting up conditional questions requires more work, but it may mean that you do not need to maintain separate intake forms - reducing your workload down the road.

DOCUMENT AUTOMATION INTERVIEWS

Document automation software, such as Gavel, Knackly and XpressDox, can often be used to disseminate client intake forms. These tools allow you to create more complex interviews than using an online form, but they require a deeper understanding of the software.

PRACTICE MANAGEMENT INTERVIEWS

Your practice management software may be able to send out client interviews and import the data directly into their matter in your system. Capability varies greatly from platform to platform, but it's worth checking out if you already have practice management software or are considering investing in your practice.

PAPER FORMS

For less technologically inclined clients, you may still need paper forms. When using a Word or PDF intake form, you can easily print the form to create a paper version. Online forms, document automation interviews, and practice management interviews may take more effort to convert into a paper form.

HOW DO YOU PROTECT CLIENT DATA?

You have an ethical duty to ensure that your clients' data is safe, regardless of the method you use to collect it. When selecting online form, document automation, or practice management software providers, ensure that their encryption methods are sufficient to protect your clients' data, including practice-specific data such as HIPAA-covered medical information. Be sure to use HTTPS-secured forms or better, as required by statute or regulation. With some providers, paid accounts offer better encryption than free accounts.