



Intake Script for Short/Long Term Disability Cases:

Introduction:

1. Greeting:
 - a. Hello, and thank you for contacting [Law Firm Name]. My name is [Your Name], and I'm here to assist you. May I have your name, please?
2. Basic Information:
 - a. Can you provide your full name, contact number, and email address?

Case Details:

3. Nature of Disability:
 - a. Briefly describe the nature of your disability. When did you become disabled, and how has it affected your ability to work?
4. Employment Details:
 - a. What is your current employment status? Are you employed full-time, part-time, or on leave?
5. Employer Information:
 - a. Can you provide details about your employer, including the company name, address, and contact information?
6. Insurance Coverage:
 - a. Do you have short-term disability insurance through your employer? If so, have you applied for disability benefits?
7. Medical Documentation:
 - a. Have you obtained medical documentation supporting your disability? This may include medical reports, doctor's notes, or any other relevant records.
8. Reasons for Denial (if applicable):
 - a. If you have already applied for disability benefits and were denied, do you know the reasons provided by the insurance company for the denial?

Legal Consultation:

9. Legal Representation:
 - a. Are you currently represented by an attorney regarding this matter? If yes, please provide their contact information.
10. Timeline of Events:
 - a. Briefly, can you provide a timeline of events leading up to your disability, your application for benefits, and any communication with your employer or the insurance company?



11. Questions or Concerns:

- a. Do you have any specific questions or concerns about short-term disability law or the legal process?

Closing:

12. Next Steps:

- a. Based on the information provided, we may need additional details to assess your case properly. We recommend scheduling a consultation with one of our attorneys. Would you like to proceed with scheduling a consultation?

13. Appreciation:

- a. Thank you for sharing this information with us. We understand the challenges you're facing, and we're here to help. We'll do our best to guide you through the legal process.