



Syndicate Subscription Legal Plans

EDUCATION LAW CLIENT INTAKE QUESTIONNAIRE:

DEADLINES IN EDUCATION MATTERS ARE SHORT. Disciplinary appeals may be due within days, and claims against public schools for injuries often must be filed within about 6 months. Send us any notice, letter, or decision right away.

CONFIDENTIAL. Syndicate assists students and families nationwide with college and university matters and with public and private K–12 school matters, including discipline, academics, special education and disability, discrimination and harassment, records, admissions, financial issues, athletics, and injuries. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT:

This form is being completed by:

☐ The student (18 or older)

☐ Parent / legal guardian of the student

☐ Other representative

☐ Your Full Legal Name: _____

Relationship to student: _____ **Syndicate Plan Member ID:** _____

Address: _____

City: _____ County: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — THE STUDENT & SCHOOL

1.1 Student's full name: _____ Date of Birth: _____

Grade / year in school: _____ Major / program (college): _____

1.2 School name: _____

School district / university system: _____

School address (city, state): _____

1.3 Type of school:

☐ College / university (undergraduate)

☐ Graduate / professional school

☐ Public K–12 school

☐ Charter school

☐ Private / religious K–12 school

☐ Online / independent study / home school

1.4 Primary language at home: _____ Student lives with: _____

1.5 Is the student an athlete on a school or college team? ☐ Yes ☐ No

1.6 Is the student an international student? ☐ Yes ☐ No



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PART 2 — TYPE OF ISSUE

Discipline & Conduct:

- | | |
|--|--|
| ☐ Suspension | ☐ Expulsion / dismissal |
| ☐ Revocation of degree | ☐ Cheating / plagiarism / academic dishonesty |
| ☐ Misconduct / code of conduct | ☐ Drugs / alcohol |
| ☐ Hazing / Greek life / organizations | ☐ Criminal charges connected to school |

Academics & Records:

- | | |
|---|---|
| ☐ Grade dispute / appeal | ☐ Testing |
| ☐ Graduation / diploma / degree issues | ☐ Dissertation / thesis problems |
| ☐ Transcripts | ☐ Correcting / sealing records (FERPA) |
| ☐ Letters of recommendation | ☐ Change of field of study |

Special Education & Disability:

- | | |
|--|--|
| ☐ IEP (special education) | ☐ Section 504 plan |
| ☐ Disability accommodations (college) | ☐ Evaluation / eligibility |
| ☐ Services not being provided | ☐ Discipline of a student with a disability |

Safety, Discrimination & Harassment:

- | | |
|--|---|
| ☐ Bullying / cyberbullying / social media | ☐ Discrimination |
| ☐ Sexual harassment / Title IX | ☐ Sexual assault |
| ☐ Injury at school or school activity | ☐ First Amendment / free speech / religion |

Admissions, Enrollment & Money:

- | | |
|--|--|
| ☐ Admissions (undergraduate / graduate) | ☐ Medical school match program |
| ☐ Transfer / magnet / school choice | ☐ Residency (tuition or district) |
| ☐ Attendance / truancy | ☐ Financial aid / scholarships / awards |
| ☐ Tuition refund / financial dispute | ☐ Housing |
| ☐ Athletic eligibility (CIF / NCAA) | ☐ Private school enrollment contract |
| ☐ Voluntary withdrawal | ☐ Lawsuit / writ / government claim |

PART 3 — WHAT HAPPENED

3.1 Describe the problem in your own words: _____



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3.2 Date the problem began: _____

3.3 Key Dates & Deadlines:

Event (notice received, meeting, hearing, decision, appeal deadline)	Date	Who Is Involved

3.4 What has the school done so far, and who have you spoken with (names and titles)? _____

3.5 Have you filed a written complaint, grievance, or appeal with the school? ☐ Yes ☐ No

If yes, explain: _____

3.6 Filed a complaint with an outside agency (OCR, state agency)? ☐ Yes ☐ No

If yes, explain: _____

PART 4 — DISCIPLINARY MATTERS

Please do not write a detailed account of the student's conduct here if there is also a police investigation. We will discuss it privately.

4.1 What is the student accused of (policy or code section, if known)? _____

4.2 Interim measures already imposed:

☐ Interim suspension

☐ Removed from class / campus

☐ Removed from housing

☐ No-contact order

☐ Removed from team / activity

☐ None

4.3 Hearing date: _____ Hearing officer / panel: _____

4.4 May the student bring an advisor or representative to the hearing? ☐ Yes ☐ No

4.5 Proposed / imposed sanction:

☐ Warning

☐ Probation

☐ Suspension

☐ Expulsion / dismissal

☐ Degree revocation

☐ Other

4.6 Is there a related police investigation or criminal charge? ☐ Yes ☐ No

If so, statements made in the school process may be used in the criminal case. Please also complete our Criminal Law Advisory Intake Form.

4.7 Does the student have a disability, IEP, or 504 plan? ☐ Yes ☐ No



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4.8 Any prior discipline?

☐ Yes ☐ No

PART 5 — SPECIAL EDUCATION & DISABILITY

5.1 Disability or condition affecting learning (if comfortable sharing): _____

5.2 Current plan:

☐ IEP (special education)

☐ Section 504 plan

☐ College accommodations

☐ None yet

Date of most recent plan / meeting: _____

5.3 Has the family or student requested an evaluation?

☐ Yes ☐ No

If yes — date requested and response: _____

5.4 What services or accommodations are needed but not being provided? _____

5.5 Has the student had outside evaluations (medical, psychological, educational)?

☐ Yes ☐ No

PART 6 — DISCRIMINATION, HARASSMENT, BULLYING & ASSAULT

Share only what you are comfortable sharing. If the student is in danger, call 911. RAINN Sexual Assault Hotline: 1-800-656-4673.

6.1 Who is responsible (student, staff, coach, other)? _____

6.2 Dates and locations (including online): _____

6.3 Was it reported to the school?

☐ Yes ☐ No

If yes — to whom, when, and what was the response? _____

6.4 Were supportive or protective measures provided?

☐ Yes ☐ No

6.5 Was it reported to police?

☐ Yes ☐ No

6.6 Has the student needed counseling or medical care?

☐ Yes ☐ No

PART 7 — INJURY AT SCHOOL OR SCHOOL ACTIVITY

7.1 Date: _____ Location / activity: _____

7.2 How the injury happened and injuries suffered: _____

7.3 Medical treatment and costs to date: \$ _____

7.4 Was an incident report completed?

☐ Yes ☐ No



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Injury claims against public schools and universities generally require a written government claim within a short period (often 6 months) before a lawsuit can be filed.

PART 8 — PRIVATE SCHOOL, FINANCIAL & ENROLLMENT ISSUES

- 8.1 Is there a signed enrollment contract or student handbook agreement? ☐ Yes ☐ No
- 8.2 Tuition / fees paid this year: \$ _____ Amount in dispute: \$ _____
- 8.3 Does the contract contain an arbitration or refund clause? ☐ Yes ☐ No
- 8.4 Financial aid / scholarship at issue: _____
- 8.5 Residency or transfer issue (districts / schools involved): _____
- 8.6 Athletic eligibility — sport and governing body: _____

PART 9 — DESIRED OUTCOME

- 9.1 What outcome do you want?
- | | |
|--|---|
| ☐ Reverse or reduce discipline | ☐ Grade change |
| ☐ Records corrected / sealed | ☐ Appropriate IEP / 504 services |
| ☐ Accommodations provided | ☐ Harassment stopped / safety plan |
| ☐ Admission / reinstatement | ☐ Transfer approved |
| ☐ Refund / financial resolution | ☐ Eligibility restored |
| ☐ Compensation for harm | ☐ Mediation / settlement |

PART 10 — DOCUMENT CHECKLIST

Please provide copies of the following, if available. Check each item you are including.

- | | |
|---|--|
| ☐ Notices / charge letters / decisions | ☐ Student handbook / code of conduct |
| ☐ Emails & letters with the school | ☐ Transcripts / report cards |
| ☐ IEP / 504 plan / evaluations | ☐ Medical or counseling records |
| ☐ Photos / screenshots / social media | ☐ Enrollment contract / tuition records |
| ☐ Financial aid documents | ☐ Incident / police reports |
| ☐ Witness names & statements | ☐ Appeal or complaint filings |



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Records Authorization & Certification:

☐ I authorize Syndicate Subscription Legal Plans to communicate with the school and to receive the student's education records for this matter. (Students 18 or older, or in college, must sign for their own records.)

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating this education matter.

Signed and dated this ____ day of _____, 20__

Signature (Student, if 18+): _____

Print Name: _____

Signature (Parent / Guardian): _____

Print Name: _____

Please Print and Email to STEVE@STEVEMUELLERLEGAL.COM, or
save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.