

CUSTODIAN INTERVIEW FORM

Custodian Name: _____ Current Title: _____

Department: _____

Phone: _____ Email: _____

Length of Employment with Company: _____

All positions held with Company: _____

To whom do you currently report? _____

List all direct reports: _____

Brief description of current responsibilities: _____

Who were predecessors in current role and where are they now? _____

Did you inherit files (paper or electronic) from you predecessors? Yes No

Describe how those files were transferred and their current location: _____

Do you have documents (paper or electronic) relevant to current matter? Yes No

Location of paper documents? _____

Do you have paper documents stored elsewhere? Yes No

Location: _____

Do you use a desktop or laptop PC? Yes No

Do you save files to the hard drive? Yes No

What is the machine name? _____

Do you use company network applications? Yes No

Applications most frequently used (Email, Word, Excel, PowerPoint): _____

Locations where you save or store electronic documents related to this matter:

- Email Network Personal Share Network Department Share
- Email Archives Workstation/Laptop Blackberry Social Media

(Print a Screen Shot of custodian PC and network folder directories and have custodian circle specific folders containing relevant documents. Staple the Screen Shot to this form).

List any databases, proprietary programs or other software you use: _____

Any documents on external media (hard drive, flash drive, CD/DVD)? Yes No

Are any relevant documents stored on your home computer? Yes No

Does your administrative assistant save or store any files for you? Yes No

Location of assistant's files: _____

Is there any other information you can think of that will help locate relevant files? _____

Interviewer: _____ Date: _____

Authorization for collection of paper and electronic records (discuss with case team):

I authorize [the company/counsel] to collect all relevant paper and electronic files from my workspace, computer and network drives and servers, including email, electronic documents, records created in databases or stored on external media.

Employee: _____ Date: _____

Reminder: You should not delete or in any way destroy or alter any paper or electronic files that may be relevant to this matter.