[APPROPRIATE AGENCY LETTERHEAD]

**Intake Guide**

NOTE: Organizations are welcome to adapt these sample materials to fit your needs and the work you do. You may change wording to match the language your organization prefers (e.g., survivor or service participant). Before using this template, delete any notes in grey and be sure to replace all highlighted sections with you program-specific information.

*Note to staff:* The intake process is not a single document or contract, but instead should be viewed as the first step towards establishing a respectful and supportive relationship with the program participant. Your goal is to create a safe and nurturing environment, while gathering some basic information about the participant’s needs and wants. This document provides some guidelines for questions you may want to ask, but the participant should be given complete control over what he or she shares. You can use these questions as suggestions, but don’t feel you have to follow this document exactly. Remember, it is acceptable and common that not all information will be disclosed during the first couple meetings, and information can be received over time as you continue to establish trust.

**\*\*To ensure privacy and confidentiality, it is a recommended best practice to limit notes to a minimum. The purpose of this guide is to help facilitate a conversation and establish a relationship. All answers do not need to be documented and retained in a file.**

**1)** Take a minute to explain the purpose of the intake meeting and what you hope to accomplish. For example, tell the survivor you are hoping to get to know them a bit better; hear from them about their immediate and short-term concerns, issues, and needs; and together create some next steps for services and support. Remind them that you are here to serve as their ally, not to judge them or make decisions for them; that they are free to share as much or as little as they feel comfortable with; and that you ask these questions to learn more about how you can help them gain safety and stability.

**2)** What are your most pressing needs today? What areas of your life would you like to discuss first?

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**3)** Let’s talk a little about your *health and well-being*. I am interested in understanding how this program can best serve you. Please remember you are welcome to only share information you believe is relevant to your participation in this program.

Please describe any health issues that may be relevant to your time here. We can discuss physical or emotional health concerns, and/or the health of your dependents.

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If you are currently taking any medications, are there any questions or concerns that we can answer for you (for example, do you need a place for storage, a refill, or a re-assessment of medication needs)? Are there any ways in which program staff can help you in this area?

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***Note to advocate: The next questions are to assess whether the survivor would like any information or support regarding the use of alcohol or substances. If your organization does not allow participation in the program if someone is currently using alcohol or substances, you should disclose this to the survivor PRIOR to asking the question.***

Would you like any information or support about any alcohol or specific substances (legal or illegal)? If you would like any support around the use or misuse of alcohol or other substances, please let us know how we can help you.  
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Are there any ways in which the abuser could use your past or current alcohol or drug use to harm you? (For example: *immigration proceedings, custody, ability to gain public housing*, etc.?)

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**4)** Let’s talk a little about your *safety* and any concerns you may have. This program is committed to helping you create a safety plan. We will be talking more in depth about safety planning, but let’s start with any immediate issues.

Do you feel the abuser poses a current danger? Are you worried about the safety of your dependents, pets, or anyone else?

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Do you have a current protection order or restraining order in place?

Would you like any assistance with obtaining, modifying, or extending an order?

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Is there anything else you would like to tell us or discuss regarding the abuser? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**5)** Legal issues

Do you have any current legal issues pending that you would like assistance with? (For example: probation term, civil suit, arrest warrant, driving infraction, etc.).   
Do you need help finding an attorney?

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Are there any custody and/or divorce proceedings that you would like assistance with?

Do you need help finding an attorney?

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**6)** Financial

Do you have any financial needs or goals that you would like assistance with?

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(*Note: If you are a transitional housing program that requires participants to pay a portion of their rent and/or utilities, please explain that this is the reason for the following question. If this is not a requirement of your program, this question shouldn’t be necessary.)*

Do you currently have a source(s) of income? How much? This will help to determine the portion of rent you may be responsible for.

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**7)** Tell me about your ideal housing situation. What are your housing goals, and how can we help you achieve them? (For example, are you interesting in applying for a transitional housing program, long-term housing assistance, or a regular market-rent apartment in your community?)

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**8)** Please tell me about any other goals or areas of your life that you’d like to address. I am here to be a resource and ally and support you as best I can. For example, do you want to increase income? Get an educational certificate or start a degree? Fix your car? Lose or gain weight? Learn a skill? Regain custody of your kids and/or pets? Start a hobby?

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**9)** Is there anything else you would like to discuss?   
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