Phone Screen and Intake Forms

Phone Screen: A phone screen is done with every potential guest. This provides vital information concerning basic personal information, mental health, addiction issues, reason and length of homelessness, legal history, domestic violence issues and financial position. Through the phone screen it can be assessed if the guest is willing to work with the shelter and comply with the shelter’s guidelines.

Guidelines: These are read to every intake guest and any questions can be answered at this time. The guidelines give the guest an understanding of what is expected of them before signing all the paperwork.

Release of Information: This form gives the shelter the ability to talk with other agencies, as well as others within the Mission itself, when needed. The shelter can gather information or release information concerning the guest up to four weeks after the guest leaves the shelter.

Agreement Form: This form has several waivers on it, they include: Substance Test Release which allows the shelter to do all the drug and alcohol testing it deems needed. Also it gives a release to let the guest know the shelter will notify Department of Corrections or Child Protective Services of any positive test results. Waiver confirms acceptance of guidelines and gives understanding that any items left after leaving the shelter will be disposed of immediately. Medication Agreement confirms the guest will take prescriptions as prescribed. Photo Release allows the shelter to take and use pictures of the guest to promote the Mission.

Liability Waiver: This form releases the shelter from liability if a guest is injured while staying at the shelter.

Guest Intake Statistical Report: This information is reported on in the monthly reports and must be collected upon intake.

Child Information: This information is gathered for every child on property to insure the shelter has all information concerning the child’s school, pick up information, and bus information.

Room Entry Sheet: Once the guest acknowledges that all the furniture, linens, lamps and towels are the Mission’s property, that their room key deposit of $25 will be returned to them once they exit and the room is clean and in order, that they will return the key upon their exit and they have until noon the next day to get all their property off the Missions property before it is disposed of, they can receive their key.
Case Manager Intake Forms
Used After the Phone Screening and Intake

**Intake Basics:** This is the first form to use. It includes major health issues of the woman and her children, doctor’s information and who to contact in case of an emergency.

**Intake Drug History:** This is a record of drug/alcohol use. For instance, while going down the list of drugs, the client states 'yes' for marijuana use. The client is asked when she first used this drug and when she last used the drug. The client is asked the same question for all other substances used. Pay attention to any repeating ages/ dates of first use. Ask if they have ever done in-patient or outpatient treatment and whether or not they graduated from treatment. Look for any patterns of rehab and relapse.

This is also where you would indicate if there has been any court involvement around their drug habit and whether or not their treatment with your program has been court ordered.

**Intake Education and Employment Information:** What sort of skills does the client already possess? What sort of skills would they like to posses? Have they been in the military? If so, what rank and what did they do? What was the highest level of school completed?

Also, when did their last few jobs end and why did they end? Again, look for any patterns.

**Intake Housing Information:** Are there any evictions? If so, were they section 8, do they owe any money to past landlords and what is the status of money owed? Try and collect and names of landlords and apartment complexes so you can start a list of where the client can begin to back track to get these fines taken care of or removed.

**Intake Legal Issues:** Here you would list several different legal categories. Namely; traffic tickets, DUI’s, CPS involvement, drivers license suspension, misdemeanors, felonies, pending warrants, arrests and community service hours. If they have any pending legal issues, write a brief summary. Be sure to ask if they are, or have ever been, on probation or parole. If they are on either, get their parole/ probation officers name and contact them so that you two can be on the same page with the client. (Often, community service hours can be taken care of at the shelter where your client is living!)

**Intake Psychiatric History:** Does the client have any mental health issues, such as depression, anxiety, etc? If so, are any of them severe (such as schizophrenia, PTSD, etc.)? Who, if anyone, are they seeing for psychological care at present? When was the date of their last psychological evaluation and do they have a copy of the diagnosis? Do they have a treatment plan for their diagnosis? If so, what is the plan, including any meds they take for their ailment as well as the contact information for any therapists they are seeing on a regular basis?

HIPPA laws greatly reduce the amount of information mental health therapists can share with you, but it will still be a good idea to contact any mental health workers to get the most current information about where a client is with their mental health. This is also a good opportunity to ask if they have experienced emotional, physical or sexual abuse and if they are, or have been, in treatment for the abuse.

**Intake Spiritual Survey:** This is an area where you can get a snapshot of where the client is at in their spiritual walk. First, you will want to ask if they know Jesus as their Savior. If they say yes, be sure to ask what that means to them and when they accepted him. You may want to find out where they go to church and if they prefer a denomination. This will give you a glimpse into the readiness of their heart.