Menu of Intake & Referral Forms Considerations
Intake & Referral Forms

Menu of Potential Intake Form Items

**Client Information**
- Contact Information: Name, Address, Phone, Email
- Preferred method of contact? Safe to contact or leave message? Permission to be contacted?
- Demographics: Race/Ethnicity, Gender Identity, Sexual Orientation, Relationship Status, Disability Status/Accessibility Needs, Preferred Language Spoken/Read, Interpretation or Translation Needed, Household Income, Student?
- Intake, Referral, Follow-up, Release & Network Information
- Intake Staff Name, Intake Language, Intake Date
- Incoming referral: Referred by, date of referral, urgency, contact person is primary victim/service provider
- What does the client want/need? (See Questions to Consider in Appendix B)
- Outgoing referral: Referrals provided within Network/outside of Network
- Follow-up: Are there any follow-up concerns? Summary of follow-up contacts
- Release: Were privilege, confidentiality, mandatory reporting explained to the client?

**Information about the Crime**
- Dates: offense(s), crime reported (to whom), age at victimization
- Case Info: police report #, detective, charged?, jurisdiction, prosecutor name, victim/witness assistance name, case# (civil/criminal), community-based advocate
- Crime Info: What happened? (See Questions to Consider in Appendix B), type of victimization, defendant name/date of birth/relationship to victim

**Victims’ Needs & Concerns**

*Legal Needs*
- What are the legal concerns, describe the legal issues, describe the client’s objective
- Areas of Legal Need:
  - Access to government benefits/health care/ disability services
  - Civil Legal: tort, protection order, SLAPP
  - Civil Rights/Accommodation/Access: language access, lack of disability accommodation,
  - Criminal: assistance reporting, upcoming court date, legal representation, understanding of system, advocate or court accompaniment, compensation, rights enforcement in criminal proceedings, restitution
  - Education: discrimination, harassment, Title IX, FERPA
  - Elder Law: conservatorship, power of attorney, wills & estates
  - Employment: discrimination, harassment, wage claims, worker compensation
  - Family Law: child/spousal support, custody/visitation, divorce/dissolution, paternity
  - Financial/Consumer: bankruptcy, identify theft, fraud
  - Housing: breaking lease, rent control violations, habitability, unlawful detainer
• Immigration: asylum, deportation/removal, family-based, naturalization, SIJS, T Visa/U Visa/VAWA
• Privacy, address confidentiality, identity change
• Military: benefits, court martial

Non-Legal Needs
• Describe the social service needs, summary of victims’ needs and concerns
• Types:
  • Basic Needs: food, income, housing, public benefits
  • Safety planning
  • Family & Community: family, parenting, child care, social support, spirituality
  • Disabilities/Accessibility: comprehension, cognitive functioning, mobility, transportation, disability-related issues
  • Health: physical, mental, suicide, trauma, substance use
  • Education & Employment: education, GED, ESL, employment, job training, resume
• Other
• How did you hear about us?