

MOBILE ADVOCACY INTAKE CHECKLIST

Initial Intake Appointment

Initial Completed	Program Director Reviewed		N/A
		Crisis/Information Intake	
		Completed Non-Residential Intake Form ☐ Client Information ☐ Children's Information ☐ Sensitive Information ☐ Abuser Information ☐ Incident Narrative ☐ Lethality Assessment ☐ Safety Planning Information and Tips	
		Complete Counseling Referral Form	
		"How to Contact me" form	-----
		Support Group Agreement and Code of Conduct	-----
		Non-Residential Policies and Procedures	-----
		Appropriate Safety Plan – Circle all that apply - Self-Care Plan, Suicide Safety Plan, Crisis and Brief Safety Plan, Personalized Safety Plan	-----
		Provided client documents/copy of documents	
		Next Appointment Scheduled	-----
		Complete the Home and Community Risk Screening - if needed	
		Releases of Information (ROI) – if needed	
		MyCase Check and Sex Offender Registry (check online database) for solely staff safety	-----
		Entered in DV Client Track, Millie, P.O. Tracking Sheet, FDM Tracking Sheet, etc.	-----
		Submit file to Program Director for assignment	-----

Staff/Volunteer Signature

Date

Program Director Review

Initial Completed		N/A
	Intake Checklist Complete	
	Case Assignment Complete	

Program Director Signature

Date

Second Appointment

Initial Completed		N/A
	FDM and Strengths and Needs Assessment	-----
	Next Appointment Scheduled	-----
	Home and Community Risk Screening Tool – if needed	
	Entered in DV Client Track, Millie, P.O. Tracking Sheet, FDM Tracking Sheet, etc.	-----

Staff/Volunteer Signature

Date