



# Clearinghouse on Supervised Visitation Phone Conference Agenda



February 20, 2019  
12PM/11CT

## Discussion

- **Welcome and Announcements – Everyone is invited!**
- **Check the listings on the website to ensure your program information is up to date and correct for the quarterly report. If you need to add or change anything email Lyndi Bradley at [lbradley2@fsu.edu](mailto:lbradley2@fsu.edu)**
- **Supreme Court of Florida Minimum Standards for SV Programs**
- **Report to the FL Legislature—Recommendations of the SV Standard Committee**
- **Responses to Intake Questionnaire**
- **Analysis of SV Program Intakes**
- **Intake Information from Clearinghouse Materials**
- **Examples of Intakes**

**Reminder**—The New Supervised Visitation Manual is available through the Clearinghouse and can be downloaded through this link:

<https://familyvio.csw.fsu.edu/clearinghouse/manuals-and-materials/supervised-visitation/>

**Reminder**—The New 2018 Child Sexual Abuse Referrals Manual is available through the Clearinghouse and can be downloaded through this link:

<https://familyvio.csw.fsu.edu/new-2018-child-sexual-abuse-referrals-manual-for-providers/>

# Responses to Intake Questionnaire



## 1. Do you conduct in-person intakes?

Most said yes, and for all cases. A few said for some but not all cases.

## 2. Do you charge for intake?

Some said no they do not charge for intake. Some said yes they do charge. Out of those who charge, some said they charge between \$65 and \$90 a case, and some said they charge per parent during intake.

## 3. Do you have a contract for dependency cases?

Most said they do not have a contract for dependency cases. Some said they do have a contract. Out of those who do have a contract, some say the case manager completes an intake and there is no obligation for intake on the program side. Others say the case manager completes an intake along with a referral to the program, and then the program completes an intake.

## 4. Do you ever conduct an intake a second time in the same case?

A few said they do not complete a second intake. Most said they complete a second intake when a certain amount of time has passed in between visits, another parent joins visits, or if "something new comes up."

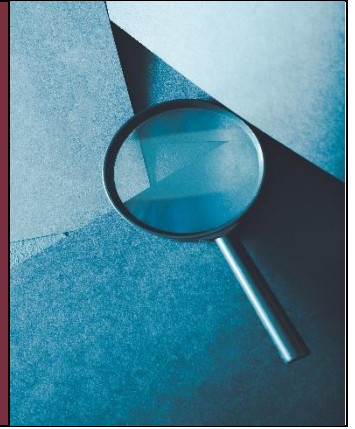
## 5. What is your personal view of intake?

Everyone views intakes as important and crucial in supervised visitation cases.

## 6. Why are intakes important to you?

Overall, everyone believes that intakes are an important process in collecting need-to-know information about the cases (children, parents, caretakers, etc.) and understanding the dynamics of the cases.

# Analysis of SV Program Intakes



## Minimum Standards

### See pg. 8 of “FL SC Supervised Visitation Requirements” document

- Intake is required upon referral and before accepting the case
  - Intakes are conducted to collect relevant information about the case, the parents, and the child, ***including special needs of the child***
- Intakes must include at a MINIMUM:
  - Case name, case number, and nature of referral;
  - Division of court;
  - Court order/referral to program;
  - Photo identification of custodial parent, noncustodial parent, authorized person, and persons authorized to deliver, pick-up, or transport a child, excepting an authorized agent of the Department of the Child and Family Services;
  - Safety and medical concerns;
  - Photo and authorization for alternative custodian, if any.

## Best Practices

### See pg. 34, 36 of “Final Report to the Legislature” document

Intakes must be conducted on all cases and included in case files (dependency and non-dependency) (p. 34, 36)

- Programs must conduct separate intake with both the visitor and the custodian of the child prior to the first visit. [If the child is in out-of-home, non-relative placement, the Program is not required to conduct an intake with the custodian, but will have received a Referral Form from the case manager.]
- Intake serves several purposes: to collect information relating to the family, the reasons for the supervision, and the resources necessary to effect the supervision; to determine whether the Program will accept or reject the case; to acquaint those whose cases are accepted with Program mission and goals; to familiarize the parents with the services provided and invite them to be respected participants in the process; to discuss the expectations of the parents, as well as the Program’s expectations; to discuss the

individual safety needs of the family as well as the cultural, racial, or ethnic considerations or special needs of the family members and discuss how the Program can assist the family; to conduct a danger assessment and enhance participant safety; and to discuss the Program policies as to confidentiality and information sharing.

After intake, a Program may choose to accept a case. However, a Program shall decline to accept a case for which it cannot reasonably ensure the safety of all clients, Program staff, and volunteers, including but not limited to the following reasons:

- the nature of the case or client is too volatile
- visitation supervisors are not adequately trained to manage issues identified in the intake
- facilities are not adequate to provide the necessary level of security
- the Program has insufficient resources, and/or
- a conflict of interest exists

Intake policies enhance security at Monitored Exchange Programs (p. 55)

Intake should ask about a history of or ongoing domestic violence so extra safety steps can be taken (p. 29)

Reminder- during intakes, staff should explain the confidentiality policy to participants.

Agencies should provide participants with a document to sign on understanding the confidentiality policy. (p. 40-41)

Monitored Exchange Intakes should include the following information: (p. 56)

- Parents' photo ID must be presented. Phone, address, marital status, special needs of parents
- Age(s), name(s), special physical or mental health issues of child(ren)
- Names, address, and photographs of children and all adult participants who are authorized to exchange the child
- Income of parents (if required by Program funders)
- Last date of parenting with child(ren)
- Determine if there is a history of domestic violence that requires danger assessment

## **Intake Elements for Non-Dependency Cases**

### **See pg. 106-107 of "Final Report to the Legislature" document**

- Referring Department/Agency Information
  - Date referral received by SV Program
  - Guardian Ad Litem: Name and phone number
  - Judge: Name, case number and division
- Child Information (complete for each child)
  - Name, SS#, DOB, Gender, Race
  - Current living situation or placement type
  - Caregiver name and phone number
- Identification and Contact Data for Parties: Custodian, Visitor, and/or Other
  - Name, SS#, DOB, Address, Phone
  - Attorney: Name, phone number and address
- Visitation Information
  - Date of first visit
  - Visitation schedule (weekly, monthly, other)
  - Date of last visit with children
  - Names of children and visiting party
- Intake Questions
  - Who else is court ordered to visit the child(ren)?
  - Additional notes involving transportation for the child(ren) to and from the visitation?
  - How many visits do you anticipate?
  - Is abuse alleged? Who is the alleged perpetrator of the abuse? What are the abuse allegations? Are there any sexual abuse allegations?
  - Is there domestic violence alleged? Conduct the Danger Assessment screening for domestic violence required by these Standards (please refer to Section IV).
  - How does each parent describe his/her relationship with the child(ren)?
  - What is each parent's relationship with the other?
  - What is the main purpose of the visitation(s)?
  - Are there any topics that should not be discussed with the child, or in the child's presence? If so, identify.
  - Does either parent have any physical or mental health issues, or any special needs that could affect visits and that SV program staff would need to be aware of prior to visits?
  - Does either parent have any substance abuse issues that could affect visits?
  - Are there any security concerns or additional comments that should be noted?
  - Does the child(ren) have any emotional or mental health issues that may be of concern or that may affect visits?
  - Does the child(ren) have any physical challenges, developmental delays, areas of concern, medications, or special needs that may affect visits?

- What is the grade level of the child(ren)? Are there any school problems or school related behavioral concerns?
- Is the child(ren) currently involved with a therapist or in a therapeutic program?
- Does the child(ren) have any gang affiliation, criminal activity, and/or Juvenile Justice (DJJ) involvement?
- Are there any parental employment (work hours) or other considerations needed when scheduling visits?
- Does each parent have access to or need information about available community resources?

## Summary of Intakes

### What did your intakes include?

<b>Intake information</b>	<b>What's missing?</b>	<b>What was included?</b>
<p><b>Referring Department/Agency Information</b></p> <p>--Date referral received by SV Program</p> <p>--Guardian Ad Litem: Name and phone number</p> <p>--Judge: Name, case number and division</p>	<p>--Guardian Ad Litem: name, phone</p> <p>--Judge's name</p>	<p>--Referral date</p> <p>--Case number</p>
<p><b>Child Information (complete for each child)</b></p> <p>--Name, SS#, DOB, Gender, Race</p> <p>--Current living situation or placement type</p> <p>--Caregiver name and phone</p>	<p>--Child's SS#, Race</p>	<p>--Child's name, DOB, Gender</p> <p>--Current living situation or placement type, sometimes just address</p> <p>--Caregiver name, phone</p>
<p><b>Identification and Contact Data for Parties:</b></p>	<p>--Visitor SS#</p>	<p>--Visitor name, address, phone</p>

<p><b>Custodian, Visitor, and/or Other</b></p> <p>--Name, SS#, DOB, address, phone</p> <p>--Attorney: Name, phone, address</p>	<p>--Attorney name, phone, address</p>	
<p><b>Visitation Information</b></p> <p>--Date of first visit</p> <p>--Visitation schedule (weekly, monthly, other)</p> <p>--Date of last visit with children</p> <p>--Names of children and visiting party</p>	<p>--Date of last visit with child</p>	<p>--Date of visitation</p> <p>--Visitation schedule (times, days)</p> <p>--Names of children and visitors</p>
<p><b>Intake Questions</b></p>	<p>-- How many visits do you anticipate?</p> <p>-- How does each parent describe his/her relationship with the child(ren)?</p> <p>-- What is each parent's relationship with the other?</p> <p>-- What is the main purpose of the visitation(s)?</p> <p>-- Are there any topics that should not be discussed with the child, or in the child's presence? If so, identify.</p>	<p>--Who else is court ordered to visit the child(ren)?</p> <p>-- Is there domestic violence alleged? Conduct the Danger Assessment screening for domestic violence required by these Standards (please refer to Section IV).</p> <p>--Additional notes involving transportation for the child(ren) to and from the visitation?</p> <p>-- Does either parent have any physical or mental health issues, or any special needs that could affect visits and that SV</p>



	<ul style="list-style-type: none"><li>-- Does either parent have any substance abuse issues that could affect visits?</li><li>-- Does the child(ren) have any emotional or mental health issues that may be of concern or that may affect visits?</li><li>-- What is the grade level of the child(ren)? Are there any school problems or school related behavioral concerns?</li><li>-- Is the child(ren) currently involved with a therapist or in a therapeutic program?</li><li>-- Does the child(ren) have any gang affiliation, criminal activity, and/or Juvenile Justice (DJJ) involvement?</li><li>-- Are there any parental employment (work hours) or other considerations needed when scheduling visits?</li><li>-- Does each parent have access to or need information about available community resources?</li></ul>	<p>program staff would need to be aware of prior to visits?</p> <ul style="list-style-type: none"><li>-- Are there any security concerns or additional comments that should be noted?</li><li>-- Does the child(ren) have any physical challenges, developmental delays, areas of concern, medications, or special needs that may affect visits?</li></ul>
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### **What's missing? What are the problems?**

- Not having basic information about the case (like the GAL, judge's name, SS#s, etc.) make it more difficult for SV staff to coordinate with other professionals on the case.
- Questions like "When was the last time you saw your child?" "What is your relationship like with your child's other parent?" and "How would you describe your relationship with your child?" will help SV staff understand the family dynamics before visits begin, so staff will be better prepared to respond to potential conflict.
- Although these questions may seem simple, asking parents "How many visits do you anticipate?" and "What is the main purpose of the visitation(s)?" will remind the non-custodial parent why they are seeing their child under these circumstances and what areas they can improve in.
- Asking about transportation, substance use, mental health, and criminal activity, help SV staff and the primary caretaker to create a safe environment for the child to visit with their family member.
- Are there any topics that should not be discussed with the child, or in the child's presence? If so, identify.
- Asking questions about the child(ren)'s academic performance and behavioral concerns can help SV staff identify if the child has any other concerns that required additional services.

### **What did your intakes include that the Standards Committee does not require?**

- Where does the child go to school/daycare?
- Does the family have a case manager? Name? Phone?
- Is there a No Contact Order?
- What is the family's primary language? Is a translator required?
- "Are you supportive of the relationship of the child(ren) and the parent through supervised parenting time? Yes/No. Explain how you will support your child(ren) in this process."
- Vehicle details- make, model, color, license plate number, driver's license number
- Who is responsible for SV fees?
- What type of visitation are you requesting? Off-site visitation, monitored exchanges, monitored telephonic visitation, monitored Skype visitation?
- What is the SV schedule recommended by court?
- When was your last court appearance?
- Has Child Protective Services been involved? Attorney General's Office? When? Why?
- Current legal custody? Current physical custody? If these are different, please explain

### **Other Possible Intake Questions:**

- How many visits do you anticipate?
- How does each parent describe his/her relationship with the child(ren)?
- What is each parent's relationship with the other?

- What is the main purpose of the visitation(s)?
- Are there any topics that should not be discussed with the child, or in the child's presence? If so, identify.
- Does either parent have any substance abuse issues that could affect visits?
- Does the child(ren) have any emotional or mental health issues that may be of concern or that may affect visits?
- What is the grade level of the child(ren)? Are there any school problems or school related behavioral concerns?
- Is the child(ren) currently involved with a therapist or in a therapeutic program?
- Does the child(ren) have any gang affiliation, criminal activity, and/or Juvenile Justice (DJJ) involvement?
- Are there any parental employment (work hours) or other considerations needed when scheduling visits?
- Does each parent have access to or need information about available community resources?

**Many of your intakes did a great job of asking for:**

- The referral date and case number
- The child's name, DOB, gender, living situation
- The visitor's name, address, phone
- The clients' preferences of when to schedule visitation
- Who, besides the primary visitor, is permitted and/or court ordered to see the child in SV
- Any instances of domestic violence in the child's home
- Transportation plans and vehicle information
- Physical or mental health concerns of the parents
- Physical challenges, developmental delays, areas of concern, medications, or special needs of the child that may affect visits
- Additional factors that could threaten a safe environment

**What did your intakes include that went above and beyond our Best Practices?**

- Where does the child go to school/daycare?
- Does the family have a case manager? Name? Phone?
- Is there a No Contact Order?
- What is the family's primary language? Is a translator required?
- "Are you supportive of the relationship of the child(ren) and the parent through supervised parenting time? Yes/No. Explain how you will support your child(ren) in this process."
- Vehicle details- make, model, color, license plate number, driver's license number
- Who is responsible for SV fees?

- What type of visitation are you requesting? Off-site visitation, monitored exchanges, monitored telephonic visitation, monitored Skype visitation.
- What is the SV schedule recommended by court?
- When was your last court appearance?
- Has Child Protective Services been involved? Attorney General's Office? When? Why?
- Current legal custody? Current physical custody? If these are different, please explain.

# Intake Information from Clearinghouse Materials



## The following information has been collected from existing Clearinghouse materials:

- Preparing for Visits – Intake and Preparation are Crucial for Safety (Supervised Visitation Manual 2017, pages 53-54)
  - Safety is not just about a program safety plan. It is also crucial that your program has sufficient information to understand what the risks are in each and every case. This happens through a process called intake. Thorough intake helps programs plan specifically for each case. Intake provides you with information upon which to create a safe visit. It also helps family members feel prepared for visits to ensure an open environment that supports communication and progress. Intake should be done in every case -- even in dependency cases where a case manager has already conducted a separate intake.
  - <https://familyvio.csw.fsu.edu/clearinghouse/manuals-and-materials/supervised-visitation/>
- Building Rapport (Supervised Visitation Manual 2017, pages 178-179)
  - Discuss the family's interactions and rituals. At intake, discuss what the client deems as "normal" interactions with family or kids (i.e. touching, interaction, eye contact, discipline, and the fact that there should be no physical discipline).
  - Upon intake, describe expectation of the role that each participant will play. Be sure to discuss these roles and expectations because they may differ from expectations that the family or client have.
  - <https://familyvio.csw.fsu.edu/clearinghouse/manuals-and-materials/supervised-visitation/>
- Facilitation Strategies (Supervised Visitation Manual 2017, pages 272-273)
  - Inform both parents at intake that visits are not to be used to speak critically of the other parent. The most important strategies are those used at intake to prevent damaging behavior at visits. If a parent needs to be reminded of the requirement for respect and appropriate references to the other parent, staff should consider more than redirection: an additional intake "refresher course" may be necessary.

- If new spouses or partners are part of the visit, the program should conduct an intake with these persons also, to determine whether a relationship already exists with the child and how the child might be affected by having the additional person at the visit.
- <https://familyvio.csw.fsu.edu/clearinghouse/manuals-and-materials/supervised-visitation/>
- The visitor monitor must be fluent in the language of the child and parent. (Sept. 2017 E-Press)
  - This rule allows for efficient communication between the family and the monitor. Monitors must be fluent in the preferred language of family. Language preference should be discussed at intake.
  - <https://familyvio.csw.fsu.edu/september-2017-e-press/>
- Discussing Culture with Families (July 2017 E-Press pt. 1)
  - Intake is the first opportunity to ask questions about what cultural information parents want the program to know about themselves and their family. Programs can use the questions below to start the conversation with parents.
  - Intake provides a great opportunity for monitors to ask questions before making any assumptions.
  - <https://familyvio.csw.fsu.edu/wp-content/uploads/2017/07/July-2017-Epress-Part-1.pdf>
- Communication with Families with Disabilities (July 2017 E-Press pt. 1)
  - During the intake process with parents, supervised visitation monitors have the opportunity to ask parents if they or their child has a disability.
  - Examples of how to ask families about disabilities:
    - How can our program accommodate you or your child's needs?
    - Will you or your child need help getting to and using the restroom?
    - Is there something you want us to know about you or your child's learning abilities?
    - Is there specific language you would like us to use during your visits?
    - Is there anything you want us to keep in mind or know about you or child during visitation?
    - Was there any difficulty getting to our program today?
  - \*\*If parents disclose a disability that they or their child has, it is important that the program has an adequate understanding about that disability and how it might impact visitation\*\*
  - <https://familyvio.csw.fsu.edu/wp-content/uploads/2017/07/July-2017-Epress-Part-1.pdf>
- Applying a Trauma-Informed Lens to Practice (Connecting Theory pt. 2 under March 2017 E-Press)

- Incorporate trauma knowledge into new intake paperwork – Programs can use intake as a time to discover unforeseen trauma and include questions to understand the client’s needs in regard to coping with that trauma.
- Explain what is going to occur during intake and visitation – Ask client if he or she feels concerned about any part of the process and also ask what would make him or her feel safe. Most importantly, try to follow through as much as possible.
- <https://familyvio.csw.fsu.edu/wp-content/uploads/2017/03/Connecting-Theory-Pt-2.pdf>
- Stalking in Supervised Visitation (Feb. 2017 E-Press)
  - Assess the risk for stalking with parents upon intake
  - Ask during intake whether the vulnerable parent has any concerns about feeling safe at the program.
  - This information may be helpful, even though it is not a formal screening. It may lead to information about what specific behavior has occurred in the past. It may open a conversation with the parent to determine what might be helpful to make the visits safer. It may lead to information about specific behavior that increases Stalking must be addressed with a sense of urgency due to its damaging effects and risk for violence. risk to the parent. Be open to working with the client in ways that apply to the parents’ particular situation.
  - Remember to provide the parent with information about accessing the local certified domestic violence center, but do not coerce the client about contacting the center.
  - While stalking incidents may occur outside of the program, it is still relevant for program staff to assess for stalking in any capacity upon intake and check-in during each visit. Program staff should also document all reported cases of stalking.
  - <https://familyvio.csw.fsu.edu/wp-content/uploads/2017/02/FebEPress.pdf>
- Incorporating Protective Factors in Supervised Visitation (April 2016 E-Press)
  - Option intake form to assess for Protective Factors on pg. 3-8 of E-Press
  - <https://familyvio.csw.fsu.edu/wp-content/uploads/2016/05/Epress-April2016post2.docx.pdf>
- Domestic Violence and Supervised Visitation (Feb. 2016 E-Press)
  - Programs should discuss at intake and periodically with the victim about the risks to the victim, children, and staff that the victim perceives as a threat. This can be an ongoing conversation to ensure program policies can be flexible enough to incorporate safety considerations of the visiting victim.
  - The intake process provides an opportunity to ask about family history, safety concerns, and family needs. These may include victim advocacy services, transportation, housing, counseling, and a range of issues that are directly or indirectly related to safety. In addition, intake provides parents with crucial

information about program policies relating to confidentiality and release of program records.

- [https://familyvio.csw.fsu.edu/wp-content/uploads/2016/02/EPRESSFEB\\_2016\\_FINALpost.compressed-1.pdf](https://familyvio.csw.fsu.edu/wp-content/uploads/2016/02/EPRESSFEB_2016_FINALpost.compressed-1.pdf)



**Table 3.1**

**Intake Issues**

A complete understanding of the dynamics of the case will require that you obtain the following information. Both parents should be asked about these issues. Keep in mind that the dependency case manager will likely have already obtained this information in dependency cases.

<b>About the Child(ren)</b>	
<i>Note: You may have to ask these questions more than once if there are multiple children in the case to assess the full family dynamics.</i>	
<b>Current living arrangements</b>	<ul style="list-style-type: none"> <li>- Where does the child currently reside?</li> <li>- Who resides there with the child?</li> <li>- How long has the child lived there?</li> </ul>
<b>Age</b>	<ul style="list-style-type: none"> <li>- How old is the child?</li> </ul>
<b>Educational level or developmental stage</b>	<ul style="list-style-type: none"> <li>- Is the child in school?</li> <li>- What grade is the child in?</li> <li>- Do you feel that the child has any developmental setbacks or advantages?</li> </ul>
<b>Mental status (emotional problems, developmental delays)</b>	<ul style="list-style-type: none"> <li>- Does the child have any emotional or mental health issues that may affect the visit?</li> <li>- Does the child have any physical challenges, developmental delays, areas of concern, medications or special needs that may affect the visit?</li> </ul>
<b>Juvenile justice system involvement, including juvenile sexual offenses</b>	<ul style="list-style-type: none"> <li>- Has the child ever been involved in the Juvenile Justice (DJJ) system?</li> <li>- Does the child have any gang affiliation or criminal history/record?</li> </ul>
<b>Past history of abuse (physical, sexual, neglect)</b>	<ul style="list-style-type: none"> <li>- Is there a history of allegations of physical, sexual, or emotional abuse or neglect?</li> </ul>
<b>Current abuse experience</b>	<ul style="list-style-type: none"> <li>- What are the current allegations related to physical, sexual, or emotional abuse or neglect?</li> </ul>
<b>Relationship between alleged perpetrator and child</b>	<ul style="list-style-type: none"> <li>- Who is the alleged perpetrator of the alleged physical, sexual, or emotional abuse or neglect?</li> <li>- What is the child's relationship to the alleged abuser?</li> </ul>
<b>Characteristics of abusive situation</b>	<ul style="list-style-type: none"> <li>- What other details can you tell me about the alleged abuse?</li> </ul>
<b>Reaction of non-perpetrator parent</b>	<ul style="list-style-type: none"> <li>- Did you believe the child when they disclosed?</li> <li>- What support are you providing to the child?</li> </ul>
<b>Reaction of alleged perpetrator</b>	<ul style="list-style-type: none"> <li>- What was the alleged perpetrator's reaction to the child's disclosure of abuse?</li> </ul>

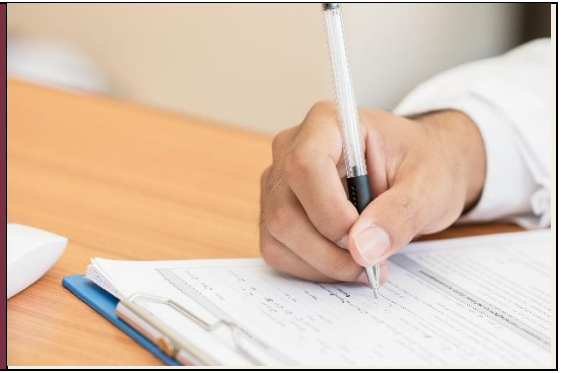
**Table 3.2**  
**Information to Obtain About Custodial and Visiting Parents During Intake**

In dependency cases, the case manager is likely to have conducted a thorough intake and is likely to have provided the family with a broad spectrum of resources. Especially in family court cases, though, you will also want to gather as much background information as you can to determine what the risks are in each case.

<b>About the Custodial/Visiting Parent</b>	
<b>Current living situation</b>	<ul style="list-style-type: none"> <li>- Is your current housing affordable?</li> <li>- Is your current housing safe and stable?</li> <li>- What adults currently live with you?</li> <li>- What children currently live with you?</li> </ul>
<b>Education</b>	<ul style="list-style-type: none"> <li>- What is the highest level of formal education that you have completed?</li> <li>- Are you interested in going back to school?</li> </ul>
<b>Employment</b>	<ul style="list-style-type: none"> <li>- Are you currently working?               <ul style="list-style-type: none"> <li>o If yes, is it full-time, part-time, or temporary? Where do you work?</li> <li>o If no, are you interested in assistance finding employment?</li> </ul> </li> </ul>
<b>Concerns</b>	<ul style="list-style-type: none"> <li>- Do you have any concerns about your child(ren)?</li> </ul>
<b>Parenting Skills</b>	<ul style="list-style-type: none"> <li>- What do you think are your strengths as a parent?</li> <li>- Do you feel that you have a good relationship with your child?</li> <li>- Do you feel there are areas of your relationship that you could potentially work on improving?</li> </ul> <p><i>Note: It is important to assess parenting skills at intake, but sometimes you will be unable to tell the true level of parenting skills until the first visit.</i></p>
<b>Discipline concerns</b>	<ul style="list-style-type: none"> <li>- Do you have any concerns about disciplining your child(ren)?</li> <li>- Do you have any concerns about your partner's discipline of your child(ren)?</li> </ul>
<b>Partner relationship</b>	<ul style="list-style-type: none"> <li>- Is there a person you can count on to care about you regardless of what is happening to you?</li> <li>- Do you have a significant other? What is your relationship like?</li> </ul>
<b>Domestic violence history</b>	<ul style="list-style-type: none"> <li>- Does this case have a history of domestic violence?</li> </ul>
<b>Substance abuse history</b>	<ul style="list-style-type: none"> <li>- Have you ever been in a detox program?</li> <li>- What about a residential treatment facility for drug or alcohol use?</li> <li>- Have others ever raised concern about how often you drink or use drugs?</li> </ul>

<b>Mental health history</b>	<ul style="list-style-type: none"> <li>- Have you ever received or are you currently receiving mental health treatment or counseling?</li> <li>- Are you currently taking any medications to treat a mental health condition?</li> <li>- How do you manage difficult feelings or emotions?</li> </ul>
<b>Mental status (emotional problems, developmental disabilities, etc.)</b>	<ul style="list-style-type: none"> <li>- How often do you feel anxious, depressed, or confused?</li> <li>- How often do you find yourself feeling sad or hopeless?</li> <li>- Do you ever think about hurting yourself or others?</li> </ul>
<b>Criminal history</b>  <b>Past history of childhood maltreatment, including child sexual abuse</b>	<ul style="list-style-type: none"> <li>- Have you ever been arrested and charged with a crime?</li> <li>- Were you ever convicted of a crime? Have you ever been incarcerated?</li> <li>- Did you ever experience maltreatment or abuse in your childhood?</li> </ul>

# Examples of Intake Forms



**Some of your intakes followed Best Practices. Take a look at “Intake Example 1” document and “Intake Example 2” document. Based on these examples, consider the following:**

- Do you prefer one of these examples over the other? If so, why?
- What did you like about these intake forms?
- What do you think can be improved?
- What could you take from these examples to improve your intake form?

## Example 1:

### INTAKE APPLICATION

(Please complete each section of this form to the best of your ability in English. If you need assistance in any other languages or if you are unable to complete the form for any reason, please contact us and we'll be more than happy to assist you. )

*\*\*\*All contact information will remain confidential from the other party.\*\*\**

**Date of Application:** \_\_\_\_\_ **Case#:** \_\_\_\_\_

**What type of visitation are you interested in (Select One):**

**Off-site visitation Monitored exchanges Monitored telephonic visitation Monitored Skype Visitation**

1. Name: \_\_\_\_\_

2. DOB: \_\_\_\_\_ Age: \_\_\_\_\_

3. Vehicle (Make, Model, Year, Color): \_\_\_\_\_  
Tag #: \_\_\_\_\_

4. Address: \_\_\_\_\_ City: \_\_\_\_\_  
\_\_\_\_\_ Zip: \_\_\_\_\_

Phone Contact:

Home:	Cell/Other:
Work:	Emergency:

5. Place of Employment: \_\_\_\_\_  
 Position: \_\_\_\_\_  
 Work Schedule: \_\_\_\_\_

6. Who is responsible for the fees? \_\_\_\_\_

7. Referred by: \_\_\_\_\_

8. Beginning and ending dates of supervision: \_\_\_\_\_

9. Last court appearance? \_\_\_\_\_

10. Schedule recommended by the Court: \_\_\_\_\_

11. If you have an attorney, please provide contact information below:

Name	Address	Phone Number/Fax/Email

**Other Parent's/Child (ren) Information:**

12. Other Parent's Name: \_\_\_\_\_

13. Phone Number: \_\_\_\_\_

14. Address (if known): \_\_\_\_\_

15. Please indicate status of your relationship with your child (ren)'s other parent:

- Divorced     Separate     Paternity     Domestic Violence

Date of Marriage: \_\_\_\_\_ Date of Separation: \_\_\_\_\_

Date filed for Divorce: \_\_\_\_\_ Date Divorced: \_\_\_\_\_

16. Child (ren) who are mentioned in the order for visitation:

Name(s)    Gender:                      DOB:                      School/ Daycare name/address/telephone:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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**Legal Information:**

17. Do you have a Court Order for supervised/monitored exchange and/or telephonic/Skype visitation services? \_\_ YES \_\_ NO

(If YES, please provide a copy of the court order for supervised visits or monitored exchanges AND explain why services were court ordered.)

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18. Is there a restraining order preventing you and your ex-spouse/partner from having contact with each other?      Yes     No

19. Have there ever been charges filed against you or your ex-spouse/partner for physical abuse?      Yes     No

20. Have you ever been convicted of a felony?    Yes     No

If yes, please describe:

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21. Has CPS ever been involved with the family? When? What reason?

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22. Has the Attorney General's office ever been involved? Explain.

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**Health Information:**

23. Do you have any medical problems the staff should be aware of? Yes No

If yes, please specify:

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Diagnosis/Disability: \_\_\_\_\_

Medication(s): \_\_\_\_\_

24. Does your child (ren) have any medical problems (including allergies) that the visiting parent or staff should be aware of? Yes No

If yes, please specify:

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25. Does your child (ren) have any special needs or disabilities that the visiting parent or staff should be aware of? Yes No

If yes, please specify:

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26. Substance use:

History of drinking alcoholic beverages:  by you  by ex-partner  not applicable

History of using non-prescription drugs:  by you  by ex-partner  not applicable

If yes, please state substance(s) of choice:

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Please state how often these substance are used:

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Do you believe that there is a problem with drugs or alcohol? (Circle One)

For you                      for your ex-spouse/partner

Treatment: \_\_\_\_\_ Length of sobriety: \_\_\_\_\_

Custody and Visitation Arrangements:

27. Who presently has legal custody of the child (ren)?

Father  Mother  Joint  Other \_\_\_\_\_  Not determined at this time

28. Who presently is the custodial parent or present has physical custody of the child (ren)?

Father  Mother  Joint  Other \_\_\_\_\_  Not determined at this time

29. If there are different custody arrangements for each child, please specify: \_\_\_\_\_

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30. What is your understanding of the reason(s) why you were referred? \_\_\_\_\_

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Language Needs:

31. If you are non-custodial parent being supervised visitation services and English is your second language, please complete the following:

a. Primary Language (s): \_\_\_\_\_

b. How would you best describe your command of the English language?

No translation needed.

I can get by without a bilingual staff person present.



- I prefer to have someone present who speaks my native language.
- I must have a bilingual staff at all times.

Additional Comments: \_\_\_\_\_

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EMAIL ADDRESS:

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Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Thank you for completing this intake application form

## Example 2:

### Intake Form

Case Number: \_\_\_\_\_

#### Parent's Information:

Supervised Parent  Unsupervised Parent  Foster Parent  Guardian

<b>Name: (First)</b>		<b>(Last)</b>
<b>Street Address:</b>		<b>City:</b>
<b>State:</b>	<b>Zip code:</b>	<b>Date of Birth:</b>
<b>Phone Home:</b>	<b>Mobile:</b>	<b>Work:</b>
<b>Employment Status:</b>		<b>Employer:</b>
<b>Job Title:</b>	<b>Marital Status:</b> <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Divorce Pending <input type="checkbox"/> Never Married	
<b>Ethnicity:</b>	<b>Primary Language Spoken:</b> <b>Other Languages Spoken:</b>	
<b>Year, Make, Model and Color of Parent's Vehicle:</b>		
<b>License Plate:</b>	<b>DL #</b>	
<b>Emergency Contact: (Name)</b>	<b>(Phone Number)</b> (      )	
<b>Is anyone else authorized to drop off/pick up the child(ren)?</b> <input type="checkbox"/> No <input type="checkbox"/> Yes		
<b>Name:</b> _____ <b>Phone:</b> _____		
<b>Relationship to you:</b> _____		
<b>Year, Make, Model and Color of Vehicle:</b>		
<b>License Plate:</b> _____	<b>DL#</b> _____	

**Children 's Information:**

**Child(ren) Name(s)/DOB/ Gender:**

_____	____/____/____	<input type="checkbox"/> M	<input type="checkbox"/> F
_____	____/____/____	<input type="checkbox"/> M	<input type="checkbox"/> F
_____	____/____/____	<input type="checkbox"/> M	<input type="checkbox"/> F
_____	____/____/____	<input type="checkbox"/> M	<input type="checkbox"/> F

**Child(ren) reside with (check one):**    mother    father    other relative    foster home

**Primary language spoken:**

**Other languages spoken:**

**Does your child have any of the following: (If checked, please identify child by name)**

- Speech/language issues
- Allergies (specify to what)
- Physical limitations
- Other conditions (specify)

**Does your child(ren) have any special medical, physical, or mental health issues staff should be aware of?**

No    Yes (Explain)

**Will you provide documentation from child's MD re: the issue?**    Yes    No

**Supervision Details:**

Is anyone prohibited from seeing the child(ren) during the supervised parenting time?    Yes    No If yes, who is prohibited?

\_\_\_\_\_

\_\_\_\_\_

**Is there a No Contact Order/Injunction in place?**     No     Yes If yes, complete the following:

Filed by: \_\_\_\_\_ against \_\_\_\_\_

Effective dates of order: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ until \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ Are there any pending allegations of physical or sexual abuse?    Yes    No

Who has made the allegation? \_\_\_\_\_

Who is the alleged perpetrator of the abuse? \_\_\_\_\_

Are there any topics that should not be discussed during a visit? If so, please explain: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Are there any cultural, ethnic, or religious considerations that may help staff better prepare for visits? (Explain)

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Are there any security concerns that should be noted?  Yes  No (Explain below)

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Have you ever been treated for any physical or mental health issues?  Yes  No (Explain below)

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Do you have any history of substance abuse or violent behaviors?  Yes  No (Explain below)

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Have you ever been arrested or convicted of a crime?  Yes  No (Explain below)

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Are you supportive of the relationship of the child(ren) and the parent through supervised parenting time?

Yes  No Explain how you will support your child(ren) in this process: \_\_\_\_\_

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What needs to be improved or demonstrated to have unsupervised parenting time?

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Is there any additional information the staff should know about you or your case?\_

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Preference for supervised sessions:  Saturday  Sunday

Morning  Afternoon

Frequency of supervised parenting time per Court Order: \_\_\_\_\_

Length of supervised session: \_\_\_\_\_ hours    Date supervision to commence: \_\_\_\_\_

Additional Information:

### Intake Form for Supervised Parent

Case Number: \_\_\_\_\_

**Parent's Information:**

<b>Name: (First)</b>		<b>(Last)</b>
<b>Street Address:</b>		<b>City:</b>
<b>State:</b>	<b>Zip code:</b>	<b>Date of Birth:</b>
<b>Phone Home:</b>	<b>Mobile:</b>	<b>Work:</b>
<b>Employment Status:</b>		<b>Employer:</b>
<b>Marital Status:</b>		<b>Ethnicity:</b>
<b>Year, Make, Model and Color of Parent's Vehicle:</b>		
<b>License Plate Number:</b>		
<b>Primary language spoken:</b>		<b>Other languages spoken:</b>
<b>Emergency Contact: (Name)</b>		<b>(Phone Number)</b> (     )

**Children's Information:**

<b>Child(ren) Name(s)/DOB/ Gender:</b>
_____ / ____/____ <input type="checkbox"/> M <input type="checkbox"/> F
_____ / ____/____ <input type="checkbox"/> M <input type="checkbox"/> F
_____ / ____/____ <input type="checkbox"/> M <input type="checkbox"/> F
_____ / ____/____ <input type="checkbox"/> M <input type="checkbox"/> F

Child(ren) reside with (check one):  mother  father  other relative  foster home

Primary language spoken:

Other languages spoken:

Supervision Details:

Why has supervised parenting time been ordered by the Court? \_\_\_\_\_

\_\_\_\_\_

What do you need to improve/demonstrate to have unsupervised parenting time? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is there a No Contact Order in place?  Yes  No If yes,

Filed by: \_\_\_\_\_ against \_\_\_\_\_

Effective dates of order: \_\_\_\_/\_\_\_\_/\_\_\_\_ to \_\_\_\_/\_\_\_\_/\_\_\_\_

Are there any pending allegations of physical or sexual abuse?  Yes  No

Who has made the allegation? \_\_\_\_\_

Who is the alleged perpetrator of the abuse? \_\_\_\_\_

Are there any cultural, ethnic, or religious considerations that may help staff better prepare for visits?  
(Explain)

\_\_\_\_\_

Are there any security concerns that should be noted?  Yes  No (Explain below)

\_\_\_\_\_

\_\_\_\_\_

Have you ever been treated for any physical or mental health issues?  Yes  No (Explain below)

\_\_\_\_\_

\_\_\_\_\_

Do you have any history of substance abuse or violent behaviors?  Yes  No (Explain below)

\_\_\_\_\_

\_\_\_\_\_

Have you ever been arrested or convicted of a crime?  Yes  No (Explain below)

Is there any additional information the staff should be aware of? \_\_\_\_\_

Preference for supervised sessions:  Saturday  Sunday  Morning  Afternoon

\* \* \* For Office Use Only \* \* \*

Frequency of supervised parenting time per Court Order: \_\_\_\_\_

Length of supervised session: \_\_\_\_\_ hours Date supervision to commence: \_\_\_\_\_

Additional Information:

Contact the Clearinghouse at  
850-644-1715

