

Intake Report Requirements

An intake report must include:

- A description of services provided
- The date the intake occurred

It is also helpful to include the following:

- Documented discussion of the goals and parameters of services to be provided
- Any paperwork provided or completed
- What authorizations will need to be in place to move forward with services

Intake Sample Report:

Intake - 1/9/2024

Employment Specialist (ES) met with Joe Doe, his VRS Counselor, and his group home supervisor via Microsoft Teams.

ES spoke with Joe about what he would like to do for work. Joe is working now but is only getting 10 hours/week as a ticket taker at a movie theater. He would prefer to work at least 20 hours/week and wishes to find a new job altogether. In further discussion, it was agreed that Joe will benefit from job seeking skills training and several work experience opportunities.

Together, we discussed the benefits of job seeking skills training to work on interviewing skills. Joe is interested in several work experience opportunities in the areas of cashiering, retail salesperson, or working in an office setting as a receptionist. These are his areas of interest. Joe drives and is open to looking at work experiences within 20 miles of his home. The VR Counselor will create an authorization for these services.

The necessary release of information forms were completed and signed by Joe, who is his own guardian.

Joe and ES will meet next Tuesday and then set up weekly meetings to begin their work together. Joe prefers to meet via Microsoft Teams, as that is most convenient for him.