

**Jennings County Assistance Network  
Intake & assessment RoadMap**

In the **Supportive Case Management model**, the Brief Intake/Assessment is the sole mechanism for assessing client needs. This assessment provides the basis for developing the “RoadMap” and providing a collaborative network of case management services. In **Supportive Case Management**, a Comprehensive Assessment is not required. The individualized RoadMap could however, identify a referral to an agency using comprehensive case management.

In the **Comprehensive Case Management model** the Brief Intake/Assessment allows initiation of the “RoadMap” collaborative network of case management activities until an agency specific Comprehensive Assessment can be completed within an individual agency(s). Comprehensive Assessment and Case management plans could modify or enhance the initial RoadMap as needed.

Key information, concerning the client, family, caregivers and informal supports is collected and documented to determine client enrollment eligibility, need for ongoing case management services, and appropriate level of case management service. The Ruby Payne “Resource Scoring table” is useful for Brief Assessment and aligns with the Outcomes Module in CharityTracker.

1. Immediate needs are identified during the Brief Intake/Assessment process.
2. Immediate or crisis needs are addressed promptly.
3. Brief Intake/Assessment documentation in CT includes, at minimum:
  1. **Basic Information**
    - presenting problem
    - contact and identifying information (name, address, phone, birth date, etc.)
    - language spoken, demographics
    - household members
    - other social service providers, including other case management providers
  2. **Brief overview of status and needs regarding**
    - food/clothing
    - finances/benefits
    - shelter/housing/utilities
    - transportation/legal services
    - substance use/mental health
    - domestic violence
    - support system
4. Documentation includes appropriate releases, including CT ROI (Release of Information)
5. Client is assessed for contact point agency specific program eligibility and criteria.

**Best Practices**

- Staff with good listening and interviewing skills who can put clients at ease, obtain key personal information, and recognize potentially urgent situations should perform the Brief Intake/Assessment process. Placement into the appropriate case management model and programs depends on utilizing capable, empathetic staff.
- Information obtained during the Brief Intake/Assessment should be shared, after client consent, with other providers to coordinate services and avoid duplication of efforts. To increase efficiency, information from an agency's own program eligibility screening process may also be used in the Brief Intake/Assessment.
- **No significant learning occurs without a significant relationship.**