Intake SOP

Revised [01/21/19]

Department: Career Planners

1. **Purpose:** Define introduction of programs/services to clients, determine eligibility and steps to complete program enrollment. This process can happen in stages and can typically take between a few days to a few weeks. Note: Early connections with clients are key to long term engagement and begin with enthusiasm, empathy and a focus on client needs rather than program requirements.

2. **Responsibilities:**
   - **a. Career Planner (CP):** The CP is responsible for:
     - i. Inviting people to enroll in programs through various recruitment methods,
     - ii. Determining the client's eligibility for programs by utilizing the Intake Screening Guide,
     - iii. Referring to other resources as needed,
     - iv. Completing data entry and paperwork,
     - v. Completing intake process and enrollment into the program.

3. **Process:**
   Career Planners drive the intake process by:
   - **a.** Asking individuals about their needs/what made them reach out. Listening and assessing for possible programs/services/referrals
   - **b.** Asking about Veteran's status as all federally funded programs are required to provide priority of service at first point of contact
   - **c.** Asking about specifics for program eligibility using Intake Screening Guide. All clients should be screened for all FCI programs
     - i. If eligible for multiple programs, determine which need is most important and refer/enroll in that program. If a reverse referral, note all programs person is eligible for and indicate on the BSR Referral form
     - ii. Co-enrollment should take place when it's a benefit to a client, not just to get increased numbers
   - **d.** Providing overview of program(s) or service(s) and talking about enrollment or referral process focusing on client's most immediate need(s). Providing value in first meeting - if person's immediate need is employment, provide a job leads or walk to Resource Room. If interested in school, provide direction for research to begin.
   - **e.** If not eligible/appropriate for a program, walk out to Resource Room for job search assistance and/or provide community referrals for other needs. If your program can not help, find something else that can.
   - **f.** If another intake appointment is needed, clearly state next steps and consider providing handout/guidance for steps and providing needed paperwork for completion before the next meeting.
   - **g.** Scheduling next appointment for as soon as possible to keep engaged in the program
   - **h.** Considerations before enrollment (beyond eligibility)
     - i. Is this person's goal employment and is this person ultimately employable?
     - ii. Is this person suitable for the program?
     - iii. Does the person seem interested in the program?
     - iv. What motivates this person?
     - v. Has this person followed through on steps so far? If not, should you enroll?
   - **i.** Setting clear expectations and clear goals for next steps
   - **j.** Completing required data entry / documentation

4. **Additional Resources**
   - **a.** Intake Screening Guide
   - **b.** ERN Resource Map for referrals to non-workforce related services / programs

5. **Back-up**
   - **a.** Each CP is responsible to communicate and provide the details of his/her back-up with everyone