

Appendix J-4. Basic intake information

Information to include in an intake form when a call or email is received

Person completing form:	
Date:	
Person calling:	
Relationship to students:	
Location:	
Phone number(s):	
School district(s):	
School(s):	
Age(s)/grade(s) of student(s):	
Family situation:	
Current housing situation:	
Housing/homeless history:	
Concerns/complaints:	
Resolution desired:	
If eligibility as homeless is an issue, was an eligibility checklist used?	
Did the liaison help the family understand why the living situation should not be considered homeless?	
If school selection is an issue, was a best interest determination conducted? ¹	
Follow up with liaison: (date and narrative)	
Resolution:	

Consult flowchart to determine next steps [Link back to the flowchart or copy here.](#)

State Coordinator may collect information for this process.²

¹ LEA Liaison Toolkit includes a [best interest determination worksheet](#).

² Sample forms/checklists can be found at http://center.serve.org/nche/ibt/sc_dispute.php