SOP: Client Intake and Assessment Procedures

This SOP details the **client intake and assessment procedures**, encompassing initial client contact, information gathering, needs assessment, eligibility verification, documentation requirements, and the establishment of personalized service plans. Its goal is to ensure a consistent, thorough, and client-centered approach to effectively evaluate client needs and facilitate appropriate service delivery.

1. Purpose

To establish clear and consistent procedures for client intake and assessment, ensuring all clients are evaluated fairly, efficiently, and thoroughly in order to receive appropriate services.

2. Scope

This SOP applies to all staff members involved in the client intake and assessment process.

3. Responsibilities

- **Intake Coordinator/Staff:** Conducts initial contact, information gathering, and coordinates assessment.
- **Assessment Staff:** Performs needs assessment, eligibility checks, and documentation review.
- **Supervisors:** Ensures compliance with the SOP and provides guidance as needed.

4. Procedure

Step	Description	Responsible
1. Initial Client Contact	Receive and record client inquiry via phone, email, online form, or walk-in. Schedule intake appointment as appropriate.	Intake Staff
2. Information Gathering	Collect basic demographic information, reason for contact, and preliminary needs. Provide client with information about services and process.	Intake Staff
3. Needs Assessment	Conduct standardized needs assessment interview or form to identify client strengths, challenges, and goals.	Assessment Staff
4. Eligibility Verification	Review client information and documents to confirm eligibility for services (e.g., age, residency, income).	Assessment Staff
5. Documentation Collection	Provide client with list of required documentation. Collect and securely store documents in compliance with privacy standards.	Intake/Assessment Staff
6. Service Plan Development	Develop a personalized service plan in collaboration with the client, outlining recommended services, goals, and follow-up actions.	Assessment Staff
7. Record Entry & Notification	Enter all data into client management system. Confirm next steps with client and schedule follow-ups as needed.	Intake/Assessment Staff

5. Documentation Requirements

- Completed intake form
- Needs assessment results
- Eligibility verification documents (as specified)
- Personalized service plan
- Signed consent and confidentiality agreements

6. Quality Assurance

- Regular staff training on intake and assessment procedures
- Periodic review of client files for completeness and accuracy

- Client feedback collection on intake experience

7. Confidentiality

All client information must be handled in strict accordance with applicable privacy laws and organizational policies.

8. Review and Update

This SOP shall be reviewed annually and updated as necessary to ensure ongoing relevance and effectiveness.