

Client Intake & Triage Form

Fillable PDF - use before accepting substantive casework

Case reference

Date received

Completed by

A. Client details

Full name

Date of birth (if relevant)

Phone

Email

Address/postcode (if relevant)

Preferred contact method

Preferred language

Interpreter needed / language

B. What help is requested?

Housing / homelessness

Benefits administration

NHS / healthcare access

Understanding a letter

Meeting support

Other

Council services

Education / school

Employment support

Form filling

Immigration signposting only

Brief description of issue

What outcome does the client want?

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C. Urgency and risk

Deadline / hearing / appointment / notice date and details

Immediate danger

Adult-at-risk safeguarding concern

Domestic abuse concern

Threat / violence

Child safeguarding concern

Homeless tonight / no safe accommodation

Serious health concern

No immediate risk identified

Risk details / action taken

D. Organisations and documents

Organisations already involved

Reference numbers

Documents seen (do not copy unless needed)

E. Scope decision

Accept for KIC advocacy

Accept limited support only

Refer / signpost

Urgent safeguarding/emergency escalation

Decline - outside scope/capacity

Reason / referral destination

Next action and date