

## 1.1.1 Intake

This section covers the case management intake process. It contains intake standards for services provided by mandated child and family services agencies and licensed adoption agencies.

All child and family service agencies must use the Child and Family Services Application (Intake Module and CFSIS) for all services delivered under *The Child and Family Services Act* and *The Adoption Act*. This applies to all provincial and federal cases including all on-reserve cases.

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### Standards

The intake stage has three parts:

**Information Gathering** – *gathering* and recording of information relating to a referral (request) for services including issues identified by the referral source.

**Intake Response** – *responding* to the referral or request based on an initial assessment of the situation.

**Intake Disposition** – *deciding* on the need for ongoing service including a determination that a child is or might be in need of protection.

### ***Information Gathering***

1. **Referral Information** – The intake worker obtains information from the referral source to determine whether the referral is appropriate for child and family services or licensed adoption agency. Appropriate referrals relate to one or more of the following:
  - a child who is or might be in need of protection
  - services to children, families and communities that cannot be provided more effectively by another human service



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- a person under 18 who is pregnant or has just given birth
  - enquiries about foster parenting
  - adoption of a child
  - post-adoption
2. **Requests for Other Services** – When preliminary information indicates that a request or referral is more appropriately provided by another human service organizations, the intake worker:
- determines the reason for the referral and service requested
  - records the referral date and time
  - identifies other resources for the person when possible
  - concludes the intake and records the action taken
  - forwards a copy of the record to the supervisor within 10 working days
3. **General Enquiries** – When an intake worker receives an enquiry regarding agency services, including volunteer, homemaker, foster parent and adoption services, the worker:
- determines the nature of the enquiry
  - records the enquiry date and time
  - determines if the person intends to apply to an agency
  - provides general information about the subject of the enquiry
  - advises the person as where he or she can obtain more detailed information including websites and office locations
  - when appropriate, refers the person to the appropriate child and family services agency or licensed adoption agency, as the case may be
  - forwards a copy of the record to the supervisor within 10 working days for [review](#)
4. **Appropriate Referrals** – When preliminary information indicates that the referral is or may be appropriate, the intake worker:
- determines the reason for the referral and service requested
  - gathers and records information as to the immediate safety of all children involved, the required response time in the situation, and whether a [safety assessment](#) is indicated
  - records information on the referral including:
    - the date and time



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- type of referral source
  - whether the subject is aware of the referral
  - how to contact the referral source
- gathers and records information on persons or family members involved and where they live
  - gathers and records preliminary information regarding possible risk to children and others
5. **Prior Contact Checks** – The intake worker conducts a prior contact check through CFSIS, the Intake Module and agency records to determine if a person or family is known to the system or agency or there is an open or closed case.
  6. **Detailed Case Information** – The intake worker obtains and records detailed information on persons involved in the case to complete the intake when:
    - a prior contact check cannot be done right away
    - there is no previous record of involvement with the person or family
    - new information is provided
  7. **Issue Identification** – The intake worker obtains information on the presenting issues. If the referral pertains to a referral for services under [Part II](#) or [Part III](#) of *The Child and Family Services Act*, the worker uses the [Intake Module](#) to identify and record the presenting issues and to determine the recommended [intake response time](#).
  8. **Recording Intake Information** – All child and family service agencies must use the Child and Family Services Application (Intake Module and CFSIS) for all cases including federal cases on reserve. Intake information is recorded in the Intake Module of the Child and Family Services Application. Intake information must be recorded into the Intake Module within 24 hours of the initial contact, or sooner if required to ensure the safety of children. In offices where there is no access to Child and Family Service Application, the worker must send written or typed information by facsimile to another office of the agency within 24 hours of the initial contact. The written or typed information must be recorded in the Intake Module no later than the next working day after the date of the facsimile
  9. **Use of Intake Module Case Notes** – The intake worker records all relevant information not covered elsewhere in the [Intake Module](#) in case notes, including observations regarding possible [risk](#) to the life, health or emotional well-being of a



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child and the priority and intensity of services that may be required.

### ***Intake Response***

10. **Intake Response Time** – Upon receiving a referral for services and identifying the presenting issues, the intake worker responds:
- immediately and within 24 hours when a child may be at [high risk](#) of being in need of protection
  - within 48 hours when a child may be at [medium risk](#) of being in need of protection or a notice of maternity is received under [subsection 9\(4\) of \*The Child and Family Services Act\*](#)
  - within five working days when a child appears to be at [low risk](#) of being in need of protection or when a child under 12 years of age is involved in criminal activity
  - within 10 working days when there are no apparent child protection concerns, but services are needed to strengthen and support a family, or when services under *The Adoption Act* are requested.
11. **Mandatory Safety Assessment** – When the identified issues (No. 8) require a response immediately and within 24 hours, the intake worker completes the Safety Assessment within 24 hours from the time the referral is received unless the supervisor approves an extension based on a review of the circumstances in the case. Depending on the agency, the initial worker may carry out the safety assessment, refer it to the appropriate worker to do, or refer it to the supervisor to assign a worker. All new reports of abuse or neglect, whether they be on a new or ongoing case, requires the completion of a Safety Assessment.
12. **Probability of Future Harm** – All intakes, whether they be on a new or ongoing case, requires the completion of a Probability of Future Harm if the report is about abuse or neglect.
13. **Physical or Sexual Abuse** – When a referral involves an allegation that a child has been physically or sexually abused, the intake worker initiates an investigation as required under section 2 of the [Child Abuse Regulation](#) and a [child protection investigation](#) described in Section 1.1.2, Assessment. When an allegation concerns a person who works for an agency, the supervisor of the person must refer the matter to



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the provincial child abuse investigator at the Child Protection Branch under [Section 18.6](#) of *The Child and Family Services Act*. If the allegation concerns a supervisor or agency director, the Child Abuse Coordinator or other appropriate senior officer of the agency must refer the matter.

14. **Use of Collaterals** – When necessary due to distance or circumstances, the intake worker may confirm the immediate safety of any children through contact with and assistance from:

- police
- hospital
- school
- individuals in the local community approved by the agency

The worker does not rely on information and assistance from anyone whom he or she believes cannot be trusted in the situation. The worker provides information to collateral contacts in accordance with confidentiality provisions in [Subsection 76\(3\)](#) of *The Child and Family Services Act*. Also see [Use of Collateral](#) in Section 1.3.1, Child Protection Services.

15. **Another Agency Involved** – Consistent with section 7 of the [Joint Intake and Emergency Services by Designated Agencies Regulation](#), on determining that another child and family services agency is currently providing services to a family or has a child in care, the intake worker notifies the other agency of the intake referral by the end of the next working day and, with that agency, develops a plan for providing services.

16. **Reviews of Intake Reports** – The supervisor reviews all intake reports that conclude a child may be [in need of protection](#) within two working days of receiving the report. The supervisor ensures that appropriate action has been taken, including the development of a [safety plan](#) when required. When necessary, the supervisor also assigns a worker to complete the intake process.

17. **Client Contact at Intake** – When there are protection concerns in a case, the intake worker or, if the case has been [transferred](#) to another agency or another worker, the assigned worker has direct contact with the person or family within 10 working days of receiving the referral for service. Also see [Contact with Children](#) in Section 1.1.0, Case Management.

18. **Immediate Placement of Child** – When immediate out-of-home placement of a



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child is required, the intake worker:

- when possible, involves the family and child in the decision and choice of placement and assists them in making an informed choice by sharing non-identifying information on potential caregivers
- involves other service providers or agency staff as necessary in identifying alternate caregivers
- implements the preferred choice of the family and child when possible unless that choice is known to put the child at risk of requiring protection or is clearly not in the best interests of the child
- places the child in accordance with [place-of-safety](#) standards

This standard also applies to the [planning](#) stage.

**19. Placement Priorities** – In deciding on a placement resource, the intake worker considers the following caregivers in order of priority:

- immediate or extended family regardless of residence
- other families within the child's community of origin
- other families of the same region or tribal council as the child
- other families of the same racial, cultural or linguistic group as the child
- former care givers
- a placement resource that facilitates contact with a parent or guardian
- alternatives that meet the child's needs

This standard also applies to the [planning](#) stage.

**20. Post-adoption Requests** – For post-adoption service request, the intake worker:

- ensures all requests for non-identifying information are in writing
- forwards any completed post-adoption registration forms to the post-adoption registry within five working days of receiving the form
- notifies the post-adoption registry within one working day when a registration is withdrawn or there is a change in circumstances such as an address, a name or a death

**20. Authority Determination Protocol** – If ongoing service is indicated, the intake



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worker administers the ADP, if not completed prior to this intake, to determine which child and family services authority is responsible for providing services. The ADP process is set out in Part 2 of the [Child and Family Services Authorities Regulation](#). The intake worker may complete a new ADP when a case has been closed for more than a year or when there has been a change in a spouse or partner.

### ***Intake Disposition***

21. **Intake Worker Recommendations** – On completing the intake report, the intake worker notifies the intake supervisor within one working day with a recommendation to either open the case for ongoing service or close it at intake. If the recommendation is to open the case for ongoing services, the worker also makes recommendations with regard to an appropriate [case category](#), transferring the case to the appropriate child and family services agency when applicable, and the timing of the transfer (see Section 1.1.6, [Service Completion](#)).
22. **Case Decision and Referral** – Within two working days of receiving the report, the intake supervisor authorizes an intake disposition and, when required, ensures that a written request to [transfer](#) the case is sent to the appropriate child and family services agency (the receiving agency) along with all relevant information and documentation. The supervisor also ensures that the intake decision is consistent with ADP requirements and [transfer](#) standards.
23. **Receiving Agency Response** – Within five working days of receiving the transfer request, the receiving agency confirms in writing if it will accept responsibility for providing ongoing services. The decision to accept or not accept transfer of a case must be consistent with the ADP process.
24. **Assignment of Case Manager** – In assigning a case manager for ongoing services, a supervisor:
  - when applicable and feasible, considers workers who have had a positive relationship with the person or family in the past
  - designates one case manager when more than one worker may be involved with the case
25. **Continuing Responsibility for Case** – Consistent with section 9 of the [Joint Intake](#)

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[and Emergency Services by Designated Agencies Regulation](#), the intake worker or unit, as the case may be, is responsible for the case until it is assigned to another worker in the agency or transferred to another agency.

## Policy

[Intake Process](#)

[Intake Module](#)

[Intake Decisions](#)

### ***Intake Process***

Intake involves gathering and screening information to determine whether services are necessary or appropriate. The intake process applies when there is a request for services or a report that a child is or might be in need of protection regardless of the current status of the case (open, closed or new).

“Intake worker” in this section refers to any person acting on behalf of a mandated child and family services or licensed adoption agency for the purposes of intake. Depending on the circumstances and agency, there may be more than one person involved. For example, an after-hours worker may initiate an intake and transfer it to the agency’s intake unit for follow-up the next day.

### ***Intake Module***

All child and family services agencies must use the provincial automated Intake Module for services to families and child protection interventions under *The Child and Family Services Act*. Agencies must use the module:

- for all new referrals
- when they receive a report that a child is in need of protection regardless of the status of the case (open, closed or new)
- upon receiving new information that causes a worker to believe that a child is in need of protection

This policy is not limited to agencies designated to provide joint intake and emergency services under [Section 21 of \*The Child and Family Services Authorities Act\*](#).



The Safety Assessment is a tool to assist a worker in determining whether there is any immediate danger to a child. Workers must conduct a Safety Assessment on all new reports of abuse or neglect regardless of whether they be on a new or ongoing case. Also, child and family services authorities may require agency staff to use the Safety Assessment in other instances.

The Child and Family Services Information System (CFSIS) is used for services not included in the intake module, including adoption or post-adoption services, and for processing foster home applications.

### ***Intake Decisions***

The case management decisions at the intake stage are:

- What service is requested and is the request appropriate for child and family services or adoption services?
- Are all children involved safe?
- What type of response is needed?
- How quickly is a response needed?
- Is the agency required to be involved with the person or family for the protection of any children?
- Are ongoing services required and, if so, what is the [level of risk](#) to children and what priority should be given to the case?
- When a case is to be transferred to another agency, which agency will be assuming responsibility for ongoing services?

### **Legislation**

The following highlights are key provisions in statute and regulations that apply to the intake process.

[The Child and Family Services Act](#)

[The Adoption Act](#)

[The Child and Family Services Authorities Act](#)



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### ***The Child and Family Services Act***

[Subsection 7\(1\) of \*The Child and Family Services Act\*](#) lists the duties of child and family services agencies.

Part II of the Act pertains to services to families. [Section 9](#) lists the services available to families and minor parents.

Part III of the Act pertains to child protection. [Section 17](#) defines when a child is in need of protection and provides examples. Under [Subsection 18.4\(1\)](#), an agency must immediately investigate a report that a child might be in need of protection and take such further steps as required by the Act and regulations or as the agency considers necessary for the protection of the child. [Subsection 21\(1\)](#) as amended by [section 37](#) of the Child and Family Services Authorities Regulation empowers the director, an authority, an agency or the police to apprehend a child believed to be in need of protection and take the child to a place of safety.

Section 2 of the [Child Abuse Regulation](#) lists the actions an agency must take on receiving information that causes it to suspect that a child is or might be physically or sexually abused. Section 7 requires that an agency, including a designated agency, refer suspected or alleged child abuse cases to an appropriate child abuse committee.

### ***The Adoption Act***

Part 2 of *The Adoption Act* contains general provisions. [Section 12 and 13](#) list the consents required for adoption of a child. [Section 26](#) states when notice to a birth father is required.

Part 3 of the Act contains provisions relating to categories of adoption. Sections 7, 8 and 9 of the [Adoption Regulation](#) prescribe services to birth parents. Section 10 sets out the services to be provided to children to be placed for adoption. Sections 14 to 23 pertain to services to prospective adoptive parents. Sections 24 to 27 apply to adoption placement services.

Part 4 of the Act covers confidentiality, disclosure and the post-adoption registry. [Section 114](#) prescribes post-adoption registry services under the current Act. Section 8 of the [Birth and Adoption Records Regulation](#) sets out the process for exchanging identifying information or having personal contact.

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### ***The Child and Family Services Authorities Act***

[Section 21](#) of *The Child and Family Services Authorities Act* provides for designated child and family services agencies to provide joint intake and emergency services. This does not mean that the intake process applies only to designated agencies. The object of section 21 is to ensure that intake and emergency services are available throughout the province.

Sections 5, 7 and 8 of the [Joint Intake and Emergency Services by Designated Agencies Regulation](#) apply to the intake process. Part 2 of the [Child and Family Services Authorities Regulation](#) pertains to the authority determination protocol (ADP).