



Home Visiting Program Intake Form

thecapacitycollective@gmail.com [Switch account](#)



Not shared

* Indicates required question

PART ONE - FIRST VISIT

To be completed by staff member

Date *

Date

mm/dd/yyyy

Staff Member Name *

Your answer

For fields you may later use to filter or sort, consider doing a drop down or other pre-filled

Client Name *

Your answer

Client Preferred Name, Pronunciation Notes, etc *

Your answer

This is asking several questions with one tiny space for answering

Looks aren't everything, but having attractive forms with your organization's branding can help level you up!

Consider including your organization's name and logo in addition to your program name.

Client Pronouns

She/Her

He/Him

They/Them

Other: _____

When choosing a field type, carefully consider whether there could possibly be more than one answer to this question. For example, someone may use multiple pronouns, so you may want to convert this to a multi-select checkbox rather than a single-select radio button.

Client Phone Number

Your answer _____

Important Cultural or Community Identities

Your answer _____

This is a great question! Treat it accordingly by giving space to write, including sufficient space between lines for longer answers

Other members of the family - name, relationship, contact information, and any notes

Your answer _____

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PART TWO - SECOND VISIT

To be completed by client

All of the demographic information below is optional. We ask for this information because our funders require us to report out on the families we are serving. Should you choose to share any information with us, it will be kept confidential and only be shared out anonymously. Please know that you can choose to skip or leave blank any one of the questions below, and it will not impact your ability to receive services from our organization.

Clarity around data consent, usage, and storage is a best practice when it comes to all of your client data, including intake forms.

Gender

Your answer _____

Race

Your answer _____

While having write-ins allows your clients to identify in a way that resonates most with them, it does also mean that reporting on any of these data points will be challenging.

Age

Your answer _____

Would asking for date of birth give you a more exact idea of the client's age?

Primary Language

At this time, we are unable to offer interpretation services, or offer services in languages other than English and Spanish. However, our hope is that, in gathering information on the primary language of our clients, we can in the future hire bilingual staff to better serve our community.

- English
- Spanish
- Other: _____

Disclaimers like these make it clear why you are collecting certain information without unintentionally promising services.

Do you have a disability?

- Yes
- No
- Prefer Not to Answer

In general, including a "Prefer Not to Answer" option is best practice - particularly for data points that you are required to collect. This will also allow you to distinguish missing data from data that participants are choosing not to provide.

Please tell us more about your accessibility needs.

Should you have any accessibility needs, we will do our utmost to accommodate them. If we are unable to accommodate your needs, we will match you with an organization or provider that can.

Good for transparency, not signaling you can offer things that you are not currently able to offer

Your answer _____

Thank you for completing this form!

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