

Keilim Policy Toolkit is an educational platform to provide resources to organizations. Keilim is not a legal document, and your organization needs to take into account all relevant federal, state, and local laws. Because laws vary by state and city, it is essential that you also work with an attorney to ensure that your protocols are legally compliant.

Living Your Policy:

Education

The intake form is intended to document the initial conversation in which a report is received. This conversation may happen formally with an individual designated to receive a report but often occurs informally with a manager or supervisor.

It is not necessary to answer all of the questions on this form. You should be actively listening, demonstrating that you hear and understand their concerns. If, in the course of doing this, you wish to ask simple, clarifying questions, do so. After the conversation, fill in the form to the extent possible based on the information provided.

Sample Intake Form

Information about Intake

Today's date: _____ Time: _____

The initial report (if received prior to today's intake) was received:

- In Person
- By Email
- Filled out a Complaint Form
- Voice Mail on Designated System
- Other Telephone _____ (number left message or called)
- Other Written Reporting _____ (explain)

How was today's intake conducted?

- In Person

- Phone
- Video
- Other _____

Name and title of individual conducting intake _____

Name(s) of individual(s) reporting _____

Relationship to organization of individual(s)
reporting _____

- Behavior was directed at them
- Witness/Bystander
- Learned about It _____ (specify how) on _____ (date, if remembered)
- Other _____ (specify)

Name(s) and relationship to organization of individual(s) to whom behavior was directed (if
different than the person bringing forward the report)

Name and relationship to organization of respondent(s)

Information about conduct being reported

How does the individual(s) describe the issue or problem?

How long has the issue or problem been going on?

What prompted the individual(s) to bring this forward?

Did others witness the behavior?

Did others take part in the Incident(s) and, if so, how (e.g., tried to intervene, covered up the misconduct, participated in the misconduct)?

If not already noted above, briefly note specific incidents described to you, including when and where they occurred.

Taking independent action (e.g., objecting) is never required, but it is important to record such action and any reaction to it, if it was shared with you. Did the individual describe any actions they have taken with regards to this situation (e.g., seek support from others, avoid activities, or otherwise attempt to address the conduct independently)?

Has this situation been previously reported to someone in the organization? If yes, when? And to whom?

How is this matter currently affecting the individual reporting or to whom the behavior was directed?

Can the complainant comfortably and safely return to work? What, if any, are your concerns about returning to work while we look into this?

After completing this intake form, move to the section on Action Planning and the accompanying Action Planning Worksheet.