



Intake Agenda & Checklist

We pride ourselves in providing a safe, comfortable, and neutral environment for children to be able to initiate, reunite with, and/or continue a relationship with their non-custodial parent(s).

1. Please complete the following items in preparation of the intake meeting:

- ☐ All intake and forms in this welcome packet.
- ☐ Copy of a government-issued photo ID of yourself
- ☐ Copy of a government issued photo ID of anyone approved to pick up or drop off your child(ren), if applicable. *Custodial Party Only*
- ☐ Any court orders, stipulations, or other legal documents which pertain to protective orders, visitation, time-sharing, or exchanges as applicable.
- ☐ A recent photo of any child(ren) participating in visitation. *Custodial Party Only*
- ☐ Your attorney's contact information.
- ☐ Any additional information you believe will aid or support THROUGH THE VALE staff provide safe and effective visitation.

2. Be prepared to review pertinent case information or history with THROUGH THE VALE staff. This may include why services are necessary, what services are required, and/or any family dynamics that are important for us to know.

3. Review forms and policies. Staff will walk through our policies and requirements for the custodial parties as well as non-custodial parties and any other individuals involved. We will review fee information, bathroom and health procedures, emergency protocols, child information, provided court documents and orders, child health and allergy information, personal history, and any other necessary procedures.

4. Establish a time-sharing plan. Visitation will not be scheduled until intake meetings have been processed by all involved parties. We will discuss a plan for the first visitation appointment and your expectations. We will also discuss any parties that will be participating in the visit and any desired activities. We do our absolute best to make birthdays, holidays, and important dates special for the child and all involved parties within reason and which conform with any court orders.

5. Discuss any payment arrangements, stipulations, and fee schedules. Unless otherwise noted in the most recent court order, it is assumed that the non-custodial party will pay 100% of the standard visitation fees. Late fees are always the sole responsibility of the offending party. If you believe there should be other payment arrangements for your case, it is your responsibility to request clarification from the judge assigned to your case.

6. Acclimation of the child(ren). We encourage the child(ren) to attend a separate meeting to properly acclimate. During this time, staff may speak casually with the child or show them around the visitation space. We do not advise they attend the intake meeting unless accompanied by another adult who is not involved in the case. *Custodial Party Only*



Supervised Visitation & Exchange Intake Form

Case Name: _____

I am the ☐ Custodial Party ☐ Non-Custodial Party ☐ Other: _____

Name: _____ DOB: _____
Last First MI

I am the Child(ren)'s: ☐ Mother ☐ Father ☐ Guardian ☐ Other: _____

Residential Address: _____
Street Address City State Zip

Mailing Address: _____
Street Address City State Zip

Phone Contact:

Home: _____ ☐ Voicemail Okay ☐ Text Okay

Cell: _____ ☐ Voicemail Okay ☐ Text Okay

Work: _____ ☐ Voicemail Okay ☐ Text Okay

Email: _____

I understand that email communication cannot be opted out of. *Please initial:* _____

Employer: _____ Position: _____

Work Address: _____
Street Address City State Zip

Do you have contact with the other party? ☐ Yes ☐ No

Is there a no-contact order? ☐ Yes ☐ No



Supervised Visitation & Exchange Intake Form

Court Information:

Judge Name: _____ Case Number: _____

County in which current petition filed: _____ Phone: _____

Custodial party's attorney: _____ Phone: _____

Email: _____

Address: _____
Street Address City State Zip

Non-custodial party's attorney: _____ Phone: _____

Email: _____

Address: _____
Street Address City State Zip

Children listed in the current Visitation Order:

Name: _____ Gender: _____ DOB: _____ Age: _____

Name: _____ Gender: _____ DOB: _____ Age: _____

Name: _____ Gender: _____ DOB: _____ Age: _____

Name: _____ Gender: _____ DOB: _____ Age: _____

Name: _____ Gender: _____ DOB: _____ Age: _____

Additional Information: _____



Supervised Visitation & Exchange Intake Form

Legal & Case Information:

Estimate the number of times you have been to court due to visitation disagreements: _____

Is there an order of any type that prevents you from contacting the other party: ☐ Yes ☐ No

If yes, you must supply a copy

Number of times the police have been contacted to enforce a no-contact order: _____

Number of times the police have been contacted for custody/visitation disagreements: _____

Have you and/or the other party been convicted of a crime?

Custodial Party: ☐ Yes ☐ No ☐ Unknown

Non-Custodial Party: ☐ Yes ☐ No ☐ Unknown

Describe: _____

Is there a history of abuse toward you by any other party in this case? ☐ Yes ☐ No ☐ Unknown

Type of abuse, if any: ☐ Physical ☐ Emotional ☐ Sexual ☐ Other: _____

Was there a weapon involved? ☐ Yes ☐ No

Does any party own weapons? ☐ Custodial ☐ Non-Custodial ☐ Neither ☐ Both ☐ Unknown

Have any of the child(ren) in this matter ever witnessed the abuse referenced above? ☐ Yes ☐ No

Describe: _____



Supervised Visitation & Exchange Intake Form

Legal & Case Information (continued):

Have any weapons ever been used in a dispute involving the child(ren)? ☐ Yes ☐ No

Describe: _____

Have any weapons been used against anyone attempting to enforce a legal order (i.e.: opposing parties, CPS, police/law enforcement, attorneys, providers, etc.)? ☐ Yes ☐ No ☐ Unknown

Describe: _____

Have the child(ren) in the visitation order been threatened or assaulted by any party? ☐ Yes ☐ No

Describe: _____

Has any party ever been involved with Child Protective Services (CPS)? ☐ Yes ☐ No

Describe: _____

Has a weapon been used in a dispute in front of the child(ren) in this order? ☐ Yes ☐ No ☐ Unknown

If yes, what type of weapon did the child(ren) witness the use of? ☐ Knife ☐ Gun ☐ Other: _____

Do you believe the child(ren) have access to any weapons? ☐ Yes ☐ No ☐ Unknown



Supervised Visitation & Exchange Intake Form

Custody & Visitation Arrangements:

Who currently has legal custody of the child(ren)?

☐ Mother ☐ Father ☐ Guardian ☐ Joint ☐ Other: _____

Who currently has physical custody of the child(ren)?

☐ Mother ☐ Father ☐ Guardian ☐ Joint ☐ Other: _____

Who currently has medical custody of the child(ren)?

☐ Mother ☐ Father ☐ Guardian ☐ Joint ☐ Other: _____

Additional Custody Information or Arrangements: _____

Until today, what were the visitation or custody arrangements? _____

How frequently have the visits been with the child(ren)? _____

How consistent have the visits been with the child(ren)? _____

How long have the visits been with the child(ren)? _____

Where did the prior visits with the child(ren) primarily take place? _____

Why have the arrangements changed? _____

When did the last visit take place? _____

Who was present? _____



Supervised Visitation & Exchange Intake Form

Custody & Visitation Arrangements (continued):

Are the child(ren) aware why the visits will be supervised? ☐Yes ☐No ☐Unknown

Do you need assistance explaining the arrangements with the child(ren)? ☐Yes ☐No ☐Unknown

How do you believe the child(ren) will react to the visits taking place here? _____

Do you believe the child(ren) will react positively to seeing the non-custodial parent? ☐Yes ☐No

How can THROUGH THE VALE and our staff make this a better experience for the child(ren)?

Will either party or the child(ren) require an interpreter? ☐Yes ☐No

Are there any other concerns regarding visitation or arrangements? _____



Supervised Visitation & Exchange Intake Form

Please read the following policies and procedures carefully. If you have any questions, concerns, or require clarification, let us know as soon as possible so we can best assist you. By initialing on each line, you are agreeing to these written policies and procedures in full. These items may be altered, rescinded, or added to at any time by THROUGH THE VALE. We will endeavor to contact you via writing, typically by email, prior to any changes being implemented.

1. I understand that smoke breaks are not allowed and chewing gum inside the visitation
2. Food and drinks brought to the visit cannot contain any drugs, alcohol, or illicit substances. This includes THC and CBD products. THROUGH THE VALE is not responsible for any food eaten on the premises that is provided by the parties or any external source.
3. Non-custodial parties may not breast-feed or provide breast milk for use during visitation unless expressly allowed in the most-recent court order.
4. All diapering and toileting assistance will be provided by the non-custodial parent, unless otherwise noted in the most recent court order. *See Diapering Policy (page 9)*
5. All weapons must be left at home. This includes guns, knives, pepper spray/mace, brass knuckles, or any other object, intended or otherwise, that may cause harm to the child(ren) or staff members. Being found with or suspected of concealing any weaponry will result in visit termination and a police report will be filed. Future visits will not be scheduled until new orders are issued.
6. Open and home-made food and drinks are not allowed, as the safety of these items cannot be verified or assured.
7. All information gathered is treated as confidential and only shared with parties outlined in the visitation order, their attorneys, or the court as required.
8. Reports are filed with the appropriate court(s) every 8 weeks, unless otherwise noted. Parties and their attorneys may request summaries at any time. There is a \$25 Report Fee for any summaries requested prior to the assigned filing schedule.
9. I agree to THROUGH THE VALE fee schedule in its entirety. This includes due dates, late fees, returned check fees, payment remittance, etc.
10. I agree to abide by and comply with THROUGH THE VALE cancellation, reschedule, and no-show policy as laid out on the appropriate fee schedule.
11. I agree to ensure the child(ren) use the bathroom prior to the start of the visit (custodial party) or I agree to use the bathroom prior to the start of the visit (visiting party). This is to maximize visitation time between the visiting party and the child(ren).
12. I certify that all information within this packet is truthful and accurate. It is grounds for dismissal if it is discovered that I have lied or misrepresented any item within.

Signature: _____ Print: _____ Date: _____



Diapering & Personal Care Policy

To ensure the safety, comfort, and dignity of all children during supervised visitation, the following diapering and personal care policy applies:

1. Non-Custodial Responsibility:

The non-custodial party is responsible for changing diapers, assisting with diapering, or providing personal hygiene care unless specifically noted in writing by a current court order.

2. Provider Responsibility:

If the non-custodial party cannot provide diaper changes for any reason, the supervising provider will perform diaper changes as needed during the visit to maintain the child's comfort and hygiene. Diapering will be conducted in a sanitary space, using gloves and appropriate supplies.

3. Parent Responsibilities:

The custodial parent is required to arrive with the child in a clean diaper and to provide all necessary items, including diapers, wipes, creams, and extra clothing. If supplies are not provided, visits may be shortened or paused to ensure proper care.

4. Documentation:

All diaper changes performed will be documented, including time of change and any notable observations (e.g., rash, excessive soiling, signs of discomfort). These notes will be included in the visit summary.

5. If a toilet-trained child has an accident during the visit:

- Either the provider or visiting party will assist the child with changing and cleanup as needed, while maintaining the child's dignity and privacy.
- The provider will document the incident, including any signs of discomfort, refusal to use the restroom, or lack of appropriate supplies.

6. Health & Safety:

The child's well-being takes priority. If a diaper change is urgently needed, it will be completed by the provider regardless of whether supplies were provided. The custodial party will be charged \$10 for every diaper and/or replacement clothing item supplied by THROUGH THE VALE.



Parental Abduction Prevention Policy

The Safety of children and families is our top priority. The following policies are in place to prevent parental abduction from occurring during visitation services:

1. Secure Entry & Exit:

All visits take place in a secure location with controlled entry and exit points. The outer office door may be locked during visitation to prevent unauthorized access to or removal of the child. Only the provider will open the door for arrivals and departures.

2. Escorted Transitions:

When necessary, the provider or other staff will personally escort the child from one point to another, such as walking them from the visitation space to the custodial party's vehicle. Visiting parties may not leave the visitation space under any circumstances, unless approved by the supervising provider.

3. No Unauthorized Departures:

Any attempt by a parent or another individual to leave with the child without approval will be treated as a potential abduction attempt. Law enforcement will be contacted immediately if a child is removed or threatened with being removed without authorization.

4. Identification Requirements:

All parties and approved visitors must show valid photo identification at intake and any time upon request. No third parties may attend or participate in visitation unless specifically authorized by court order and pre-approved by the provider.

5. Court Order Compliance:

Visitation will follow the exact terms of the court order. No changes in schedule, location, or participants will be honored without written documentation from the court. Attempts to violate or alter the visitation plan without approval may result in suspension of services and notification to the court.

6. High-Risk Cases:

In cases with a documented history or risk of abduction (ie: prior threats, restraining orders, custody disputes, etc.) will require enhanced safety protocols, as determined necessary by the provider. Additional fees may apply due to these enhanced protocols.

7. Emergency Response:

If an abduction attempt is made, suggested, joked about, or threatened at any time, the provider will immediately contact 911. The custodial party will be notified as soon as reasonably possible to do so and an incident report will be generated. Future visitation services will be denied until a new court order is made and a new intake interview is conducted.



Mandatory Reporting Policies

As a supervised visitation provider in the State of California, your provider is a Mandated Reporter under California Penal Code §11165.7. This means providers are legally required to report any suspected child abuse or neglect to the appropriate authorities. This applies to custodial parties and non-custodial parties equally.

1. What Must Be Reported:

Physical abuse, Sexual abuse or exploitation, Neglect (including medical neglect or failure to provide basic needs), Inappropriate or unsafe behavior by any party during the visit, Exposure to domestic violence, General threats, Emotional abuse, Any other behavior that a reasonable person would determine to be inappropriate, dangerous, and/or likely to cause harm.

2. How Reports Are Handled:

If a concern arises during a visit or through communication with a child or parent, a report will be made to Child Protective Services (CPS) or law enforcement, as required by law. Reports are made immediately by phone, followed by a written report within 36 hours. Reports are confidential. THROUGH THE VALE providers are prohibited by law from informing any parent or party involved once a report has been made.

3. Compliance with Standard 5.20:

This policy is consistent with California Standard of Judicial Administration 5.20, which outlines the responsibilities of supervised visitation providers. As stated in Standard 5.20, all professional providers must adhere to the legal requirement to report suspected **child** abuse or neglect and maintain neutrality while prioritizing the child's safety and well-being. Compliance with this standard is mandatory and guides the provider's conduct, documentation, and reporting responsibilities during supervised contact.

4. Additional Notes:

Your provider's role is not to investigate or determine guilt—only to report reasonable suspicion. Staff may also report any threats of harm to self or others, in accordance with safety laws and ethical standards.



Recording & Photography Policy

1. Audio & Video Recording:

No audio or video recording is allowed by parents, children, or visitors during supervised visitation sessions. This includes but is not limited to the use of:

- Cell phones
- Smartwatches
- Hidden devices
- Tablets or laptops
- Cameras

Any attempt to secretly record a session may result in immediate termination of the visit, documentation of the incident, and possible suspension of services.

2. Photography by the visiting party is not permitted during visits unless:

It is specifically authorized in the current court order, or both parents agree in writing and the provider gives advance approval. Please note:

- Photos must be taken by the provider only, or under provider supervision.
- All photos must be child-appropriate and non-disruptive to the visit.
- The provider reserves the right to limit or deny photography at any time.

3. Special Events:

When allowed by court order, particularly during special events, birthdays, and holidays, the provider may take photographs or videos of the child(ren) with the non-custodial/visiting party. No photographs or videos will be taken on the visiting party's behalf if there is an order blocking such activities. Photographs will not be provided directly to the visiting parties, even after successful reunification. Photographs and video will be sent to the attorneys for both parties upon visitation completion. Appropriate distribution of these photographs is the sole responsibility of attorneys and/or court personnel.

4. Violation of Policy:

Any unauthorized use of recording or photography devices will be documented and may result in visit termination, suspension of services, notification to the court and/or legal representatives.

5. Providers Rights:

There are cameras in the visitation areas to aid in safety and documentation purposes. Video footage will only be released in response to a valid subpoena or in situations where immediate safety concerns require disclosure and is not part of normal visit summaries. Video footage is stored securely. Requests for footage by any party will be denied until and unless a court order is provided.



Arrival & Pick-Up Policy

To ensure safety, reduce conflict, and maintain a smooth visitation process, the following procedures must be followed for all drop-off and pick-up transitions:

1. Arrival Procedures:

The custodial party must arrive on time and remain until the provider has escorted the child to the visiting area. The visiting party must arrive at least 15 minutes prior to the scheduled start time and wait in the designated waiting area or in their vehicle until the provider initiates the visit. Late arrivals may result in a shortened visit or cancellation at the provider's discretion.

2. Pick-Up Procedures:

The custodial party must return promptly at the end of the visit. Late pickups will be documented and repeat issues may be reported to the court or result in rescheduling limitations. The visiting party is expected to remain on-site until the provider returns the child to the custodial party, unless specifically directed by court order. The visiting party may not leave with the child unless clearly authorized by court order. Children will be escorted in and out of the visitation area by the provider only. Visiting parties are not permitted to escort the child without supervision.

3. No Contact Between Parties:

Parents should not have any direct interaction during arrival or pick-up unless specifically authorized by court order. If a conflict or encounter occurs, the provider will document the incident and may temporarily suspend visits until the matter is reviewed.

4. Missed or Late Arrivals:

A 15-minute grace period is provided for both parties. If the visiting party fails to arrive within this period, the visit may be canceled and marked as a no-show. If the custodial party is more than 15 minutes late picking up the child, the provider may:

- Contact the emergency contact(s) on file
- Charge a late pickup fee
- Report repeated issues to the court
- Contact CPS or law enforcement, if necessary

5. Safety First:

All transitions will occur in a secure, neutral environment. Any concerns about safety, compliance, or unusual behavior during drop-off or pick-up will be documented and, if necessary, reported to legal counsel or the court.



Termination of Services Policy

Supervised visitation services may be terminated at the discretion of the provider when the safety, appropriateness, or integrity of services is compromised. Termination may be temporary or permanent depending on the severity of the issue.

1. Grounds for Termination:

Services may be terminated for any reason, including but not limited to:

- Repeated failure to comply with visitation rules, policies, or court orders
- Aggressive, threatening, or unsafe behavior toward the child, provider, or other party
- Attempts to manipulate the child or provider, or to coach or interrogate the child during visits
- Three or more no-shows or late cancellations without reasonable excuse
- Failure to pay required fees in a timely manner
- Discovery of inaccurate or incomplete information provided at intake that affects safety or appropriateness of services
- Substance use before or during visits (including alcohol, marijuana, or illegal drugs)
- Any attempt to remove the child from the visit area or leave with the child without permission
- Failure to provide updated court orders or necessary documentation
- If the provider determines that the child is experiencing distress, fear, or emotional harm during visits

2. Process for Termination:

In non-emergency situations, written notice of intent to terminate services will be provided to both parties and, if applicable, their attorneys. In cases involving immediate safety concerns, services may be terminated without advance notice, and the court or attorneys will be notified within 24 hours. All terminations will be documented in writing and may include a final summary or incident report upon request.

3. Reinstatement of Services:

Reinstatement may be considered only if:

- The underlying issue has been resolved
- A new court order is issued
- Both parties agree to comply with all provider policies going forward

4. Provider's Right to Refuse Service:

The provider reserves the right to refuse or discontinue services at any time if they determine that continuing would compromise safety, neutrality, or the best interests of the child.



Core Policies & Summary

- ❖ **Arrival & Pick-Up:** Timely drop-off and pick-up are required. No contact is allowed between parties. Repeated tardiness may result in shortened or suspended visits.
- ❖ **Recording & Photography:** No audio, video, or photographs may be taken by parties. If allowed by court order, the provider may take photos during holidays or special events to be sent to counsel—not directly to either party.
- ❖ **Mandatory Reporting:** The provider is a mandated reporter under California law and must report any suspected abuse or neglect to the appropriate authorities without informing the parties.
- ❖ **Parental Abduction Prevention:** Children cannot be removed from the provider's care by the visiting party. Any attempt to do so will be treated as an emergency.
- ❖ **Behavior Expectations:** Visits must remain calm, respectful, and child-focused. No verbal abuse, threats, manipulation, or inappropriate topics.
- ❖ **Drug, Alcohol & Tobacco Policy:** Visitation will not occur if a parent appears to be under the influence of alcohol, marijuana, or drugs.
- ❖ **Discipline Policy:** No physical discipline or aggressive correction is allowed during visits.
- ❖ **Illness Policy:** Visits may be rescheduled for contagious illness or medical concerns.
- ❖ **No-Show & Cancellation:** A minimum of 24 hours' notice is required to cancel. Three no-shows may result in service termination.
- ❖ **Termination Policy:** Services may be paused or ended if there are safety concerns, repeated policy violations, or noncompliance with court orders.

Acknowledgment & Agreement

I acknowledge that I have received, read, and understand the policies summarized above and as fully outlined in the intake packet. I agree to follow these policies and understand that failure to do so may result in denial, suspension, or termination of supervised visitation services.

Party to the Case:

Signature

Print Name

Date: _____

Through The Vale:

Signature

Print Name

Date: _____



Identification & Vehicle Information

☐ Custodial

☐ Non-Custodial

Identification Information:

State-Issued ID/DL Number: _____ Exp.: _____

Vehicle Information:

Make & Model: _____ Year: _____ Lic. Plate: _____

Party to the Case:

Through The Vale:

Signature

Signature

Print Name

Print Name

Date: _____

Date: _____

Case No. _____