## Sample Threat Assessment and Management Forms

The following pages provide sample forms to help schools document information related to all aspects of threat cases, from initial report/intake, triage, assessment, initial case management, case updates and case closure. Note that schools are NOT required to use these forms. Rather, they are provided as a resource to support schools in their efforts to identify, assess and manage potential threats to the school and its members.

All the forms are also available on the DCJS website at:

[www.dcjs.virginia.gov/virginia-center-school-and-campus-safety/threat-assessment-virginia](https://www.dcjs.virginia.gov/virginia-center-school-and-campus-safety/threat-assessment-virginia)

The forms are available for use in a downloadable PDF format to be used as they are, or in a WORD format.

School threat assessment teams are encouraged to download the forms, edit them to meet their policies and procedures, and use them as best meets their needs. Teams may use all, some, or none of these forms and may edit them to meet local needs.

### Overview of Threat Assessment and Management Forms

##### Part I: Intake for Initial Report Concerned

This form is to document initial reports. The first page is to document the incident/concern that occurred. The items about the incident are intended to gain a full understanding of what occurred and if there are any obligations for further notifications.

The next two pages are to document the persons involved in the potential case, i.e., the subject(s), target(s)/others impacted, and witnesses. If necessary, use additional copies to document information about additional persons involved.

##### Part II: Triage

This form has three pages. The first is for documenting standard record checks. Note these items should be updated to reflect the record sources and access of the school’s threat assessment team. The second page is a summary checklist of key issues for consideration of need for further assessment or intervention. The purpose of the triage is to determine if there is need for further review and action by the full team or if the concern can be reasonably resolved at triage or by referral to existing resources. The third page is for documentation of any required notifications, additional information, and the findings of the triage process.

##### Part III: Threat Assessment

There are two pages for this form which provides key areas for inquiry regarding each of the STEP domains, and a checklist of key factors that will inform assessment and case management considerations. The key areas and items reflect the content of the Guidelines for Threat Assessment in this *Guide.* This form may also be used to update key areas/information during ongoing case reviews.

**Part IV: Initial Case Management Plan**

This form uses the STEP framework to outline the case management plan. The teams should identify tasks, team members responsible for overseeing completion of the tasks, and a date/time the task is due for update to the team.

**Part V: Case Update**

Like the initial Case Management form, this uses the STEP framework for modification to the case management plan, including both updates such as new information or outcomes of prior action items, and new or ongoing tasks for each of the domains. The teams should identify tasks, team members responsible for overseeing completion of the tasks, and a date/time the task is due for update to the team. This form can be used to document each review of the case.

**Part V: Case Closure**

Teams may use this form to document a thorough, diligent and deliberate review of the case to ensure that any concerns using the STEP framework have been sufficiently addressed, to the point that the case is stable at a Routine/No Known Concern or Low Level of Concern.

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| **THREAT ASSESSMENT & MANAGEMENT FORM** |
| **PART I: INTAKE for INITIAL REPORT OF CONCERN** |
| **Date Reported:** |  | **Day of Week:** [ ]  Monday [ ]  Tuesday [ ]  Wednesday [ ]  Thursday [ ]  Friday [ ]  Saturday [ ]  Sunday | **Time:** [ ]  AM [ ]  PM |
| **Taken by:**  |  | **School:**  |  | **Position:**  |  |

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| **REPORTING PARTY:** |
| **Name:** |  | [ ]  Unknown | **ID #:** |  |
| **Affiliation:** | [ ]  Administrator [ ]  Teacher [ ]  Staff [ ]  Student [ ]  Parent/Guardian [ ]  Contractor [ ]  Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  None/Unknown | **Status:** | [ ]  Current [ ]  Former [ ]  ProspectiveGrade:\_\_\_\_\_\_\_\_\_\_(if student) |
| **School:** |  | **Building/Program:** |  |
| **Home Address:** |  | **Phone:** |  |
| **INCIDENT:** |

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| **Date Occurred:** |  | **Day of Week:** [ ]  Monday [ ]  Tuesday [ ]  Wednesday [ ]  Thursday [ ]  Friday [ ]  Saturday [ ]  Sunday | **Time:** [ ]  AM [ ]  PM |
| **Location:** | [ ]  School Property [[ ]  In School Building [ ]  School Grounds] [ ]  School Bus [ ]  School Sponsored Activity [ ]  Other:       |
| **School:** |  | **Building/Program:** |  |
| **Address:** |  | **City:** |  | **State:** |  |
| **ConcernTypes:** | [ ]  Harm to Others [ ]  Abduction [ ]  Stalking [ ]  Bullying [ ]  Suicidal/Self-Harm [ ]  Aberrant Communication/Behavior[ ]  Assault [[ ]  Physical [ ]  Sexual) [ ]  Bomb/Arson [ ]  Weapon [ ]  Harassment [ ]  Mental Health [ ]  Disruptive / Suspicious Behavior |
| **Nature:** | [ ]  Act [ ]  Threat [ ]  Concern  | **Modes:**  | [ ]  In Person [ ]  Phone [ ]  Text [ ]  Email [ ]  Letter [ ]  Social Media [ ]  Internet [ ]  Other :       |
| **Persons(s) injured:** [ ]  Yes [ ]  No [ ]  Unknown  | **Persons(s) require medical attention?** [ ]  Yes [ ]  No [ ]  Unknown  |
| **Weapon involved:** [ ]  Yes [ ]  No [ ]  Unknown  | **Type of Weapon:** [ ]  Firearm[[ ]  Rifle/Shotgun [ ]  Pistol] [ ]  Edged [ ]  Explosive [ ]  Other:       |
| **Weapon referenced:** [ ]  Yes [ ]  No [ ]  Unknown  | **Type of Weapon:** [ ]  Firearm[[ ]  Rifle/Shotgun [ ]  Pistol] [ ]  Edged [ ]  Explosive [ ]  Other:       |
| **Law Enforcement Involved:** [ ]  Yes [ ]  No [ ]  Unknown  | **Agency:**  | **Arrest/Custody of Subject:** [ ]  Yes [ ]  No [ ]  Unknown  |
|  **Details of the incident/nature of concerns. Note what occurred, who was involved, where and when, if others were impacted or harmed, etc.****If threats/concerning statements were communicated, provide direct quotes where possible, using quotation marks to indicate direct quotes. Attach original communications if available.**  |
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| **PART I: INTAKE for INITIAL REPORT OF CONCERN – PERSONS INVOLVED** |

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| **SUBJECT (1) Engaging in threatening, aberrant or concerning behavior:** |
| **Name:** |  | [ ]  Unknown | **ID #:** |  |
| **Affiliation:** | [ ]  Administrator [ ]  Teacher [ ]  Staff [ ]  Student [ ]  Parent/Guardian [ ]  Contractor [ ]  Other:      \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  None/Unknown | **Status:** | [ ]  Current [ ]  Former [ ]  ProspectiveGrade:      \_\_\_\_\_\_\_\_\_(if student) |
| **School:** |  |  **Relationship to Target:** |  |
| **EmergencyContact:** |  | **Relationship:** | [ ]  Parent [ ]  Spouse/Partner [ ]  Guardian [ ]  Other:       |
| **Home Address:** |  | **Phone:** |  |
| **SUBJECT (2) Engaging in threatening, aberrant or concerning behavior:** |
| **Name:** |  | [ ]  Unknown |  |  |
| **Affiliation:** | [ ]  Administrator [ ]  Teacher [ ]  Staff [ ]  Student [ ]  Parent/Guardian [ ]  Contractor [ ]  Other:      \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  None/Unknown | **Status:** | [ ]  Current [ ]  Former [ ]  ProspectiveGrade:      \_\_\_\_\_\_\_\_\_(if student) |
| **School:** |  |  **Relationship to Target:** |  |
| **EmergencyContact:** |  | **Relationship:** | [ ]  Parent [ ]  Spouse/Partner [ ]  Guardian [ ]  Other:       |
| **Home Address:** |  | **Phone:** |  |
| **Note: If more than two subjects of concern in this incident, attach additional copies of this page with subject’s information.** |
| **TARGET (1):** |
| **Name:** |  | [ ]  Unknown |  |  |
| **Affiliation:** | [ ]  Administrator [ ]  Teacher [ ]  Staff [ ]  Student [ ]  Parent/Guardian [ ]  Contractor [ ]  Other:      \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  None/Unknown | **Status:** | [ ]  Current [ ]  Former [ ]  ProspectiveGrade:      \_\_\_\_\_\_\_\_\_(if student) |
| **School:** |  |  **Relationship to Subject:** |  |
| **EmergencyContact:** |  | **Relationship:** | [ ]  Parent [ ]  Spouse/Partner [ ]  Guardian [ ]  Other:       |
| **Home Address:** |  | **Phone:** |  |
| **TARGET (2):** |
| **Name:** |  | [ ]  Unknown |  |  |
| **Affiliation:** | [ ]  Administrator [ ]  Teacher [ ]  Staff [ ]  Student [ ]  Parent/Guardian [ ]  Contractor [ ]  Other:      \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  None/Unknown | **Status:** | [ ]  Current [ ]  Former [ ]  ProspectiveGrade:      \_\_\_\_\_\_\_\_\_(if student) |
| **School:** |  |  **Relationship to Subject:** |  |
| **EmergencyContact:** |  | **Relationship:** | [ ]  Parent [ ]  Spouse/Partner [ ]  Guardian [ ]  Other:       |
| **Home Address:** |  | **Phone:** |  |
| **Note: If more than two targets in this incident, attach additional copies of this page with target’s information.** |

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| **PART I: INTAKE for INITIAL REPORT OF CONCERN – PERSONS INVOLVED***Threat Assessment and Management Case Form — © Deisinger (2019); Licensed to Virginia Public Schools* |

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| **Witness (1):** |
| **Name:** |  | [ ]  Unknown |  |  |
| **Affiliation:** | [ ]  Administrator [ ]  Teacher [ ]  Staff [ ]  Student [ ]  Parent/Guardian [ ]  Contractor [ ]  Other:      \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  None/Unknown | **Status:** | [ ]  Current [ ]  Former [ ]  ProspectiveGrade:      \_\_\_\_\_\_\_\_\_(if student) |
| **School:** |  |  **Relationship to Subject:** |  |
| **EmergencyContact:** |  | **Relationship:** | [ ]  Parent [ ]  Spouse/Partner [ ]  Guardian [ ]  Other:       |
| **Home Address:** |  | **Phone:** |  |
| **Witness Interview** |
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| **Witness (2):** |
| **Name:** |  | [ ]  Unknown |  |  |
| **Affiliation:** | [ ]  Administrator [ ]  Teacher [ ]  Staff [ ]  Student [ ]  Parent/Guardian [ ]  Contractor [ ]  Other:      \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  None/Unknown | **Status:** | [ ]  Current [ ]  Former [ ]  ProspectiveGrade:      \_\_\_\_\_\_\_\_\_(if student) |
| **School:** |  |  **Relationship to Subject:** |  |
| **EmergencyContact:** |  | **Relationship:** | [ ]  Parent [ ]  Spouse/Partner [ ]  Guardian [ ]  Other:       |
| **Home Address:** |  | **Phone:** |  |
| **Witness Interview** |
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| **Note: If more than two witnesses in this incident, attach additional copies of this page.** |

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| **Regarding:** | **Case:** |
| **PART II: TRIAGE – RECORDS CHECKS**  |

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| **RECORDS CHECKS (ALL):** | **Checked**NS=Not Significant NA=Not Applicable | **Notes about Significant findings:** |
| Photo | [ ]  Yes [ ]  NS/NA |  |
| Threat Assessment Team history | [ ]  Yes [ ]  NS/NA |  |
| Criminal history | [ ]  Yes [ ]  NS/NA |  |
| Driver license information | [ ]  Yes [ ]  NS/NA |  |
| Vehicle/Parking information | [ ]  Yes [ ]  NS/NA |  |
| SRO/SSO contacts | [ ]  Yes [ ]  NS/NA |  |
| Local Law Enforcement contacts | [ ]  Yes [ ]  NS/NA |  |
| Other Law Enforcement contacts | [ ]  Yes [ ]  NS/NA |  |
| Protective/No Contact Orders | [ ]  Yes [ ]  NS/NA |  |
| No Trespass Notice | [ ]  Yes [ ]  NS/NA |  |
| Concealed weapons permit | [ ]  Yes [ ]  NS/NA |  |
| Weapons purchase permit | [ ]  Yes [ ]  NS/NA |  |
| Social media | [ ]  Yes [ ]  NS/NA |  |
| Online Search | [ ]  Yes [ ]  NS/NA |  |
| Other: | [ ]  Yes [ ]  NS/NA |  |
| **RECORDS CHECKS: School Staff** |  |  |
| Disciplinary actions  | [ ]  Yes [ ]  NS/NA |  |
| Grievances filed | [ ]  Yes [ ]  NS/NA |  |
| Title IX actions | [ ]  Yes [ ]  NS/NA |  |
| Application  | [ ]  Yes [ ]  NS/NA |  |
| Other: | [ ]  Yes [ ]  NS/NA |  |
| **RECORDS CHECKS: Students** |  |  |
| Class schedule | [ ]  Yes [ ]  NS/NA |  |
| Academic standing/progress | [ ]  Yes [ ]  NS/NA |  |
| IEP/504 | [ ]  Yes [ ]  NS/NA |  |
| Transfer records | [ ]  Yes [ ]  NS/NA |  |
| Conduct/Discipline | [ ]  Yes [ ]  NS/NA |  |
| Title IX actions | [ ]  Yes [ ]  NS/NA |  |
| Other: | [ ]  Yes [ ]  NS/NA |  |
| **OTHER RECORDS CHECKS:**  |  |  |  |

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| **Note: Complete a record check form for each subject and target.** |

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| **Subject:***Threat Assessment and Management Case Form — © Deisinger (2019); Licensed to Virginia Public Schools* | **Case:** |
| **PART II: TRIAGE INQUIRY SUMMARY SHEET** |  |  |
| **SUBJECT**  |  | Notes: |
| Behavior(s) causing concern/impacting others | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Concerning or Aberrant Communications | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Directly communicated threats | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Leakage: grievances, ideation/intent, planning, preparations, targets | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Identified grievances/motives for violence | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Fixation on grievances, targets, violent resolution, etc. | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Interest or Identification with perpetrators, grievances, or violent acts | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| History of violence or novel aggression | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Last resort behaviors: Desperation, imperative, diminished alternatives | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Pathway behaviors – Planning  | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Pathway behaviors – Preparing: means, methods, opportunity, proximity  | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Stalking/unwanted contact, communication, or pursuit | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Energy bursts/changes in pattern(s) of disruptive/concerning behavior(s) | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Last Resort behaviors/JACA | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Despondency, despair, isolation, and/or suicidality | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Significant cognitive, emotional, or psychological concerns | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Significant or multiple stressors/difficulty coping | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Lack of inhibitors/stabilizers to prevent violence | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Other:  | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Comments: |
| **TARGET / OTHERS**  |  | Notes |
| Identified targets (person/proxy, place, program, process, philosophy) | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Fearful of harm | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Protective actions/responding as if subject poses a safety concern | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Vulnerability: e.g., consistent routine, low situational awareness | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Need for assistance | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Other:  | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Comments: |
| **ENVIRONMENT** |  | Notes |
| Organizational climate concerns: e.g., bullying, bias, poor conflict mgmt. | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Systemic/procedural | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Report latency/failure | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Bullying/bias | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Lack of support, guidance, or resources | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Adverse social influences | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| High rates of violence, harassment, disruption, stress | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Disproportionate rate/severity of concerns | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Other:  | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Comments:   |
| **PRECIPITATING EVENTS** |  | Notes |
| Impending loss, failure | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Key dates/events  | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Triggers/reminders | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Views intervention negatively | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Contagion influence | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Return from separation | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Other:  | [ ]  Yes [ ]  No [ ]  Unknown  |  |
| Comments:       |

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| **Subject:** |  | **Case:** |
| **NOTIFICATIONS** | **Reason** | **Notes** |
| [ ]  Superintendent/Designee | [ ]  Student poses High/Imminent threat to self/others [ ]  Other  |  |
| [ ]  Principal  | [ ]  High/imminent threat [ ]  Crime [ ]  Other  |  |
| [ ]  Law Enforcement | [ ]  High/imminent threat [ ]  Crime [ ]  Other  |  |
| [ ]  Parent/Guardian | [ ]  Student poses High/Imminent threat to self/others [ ]  Other  |  |
| [ ]  Other:  | [ ]  Yes [ ]  No  |  |
| [ ]  Other:  | [ ]  Yes [ ]  No  |  |

**NOTES:**

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| **CASE PRIORITY LEVEL:** |  |  |
| [ ]  **Critical/Imminent** | [ ]  **High** | [ ]  **Moderate** | [ ]  **Low** | [ ]  **Routine/None** |
| **TRIAGE RECOMMENDATION:** |  | **BTAM CASE #** |
| [ ]  No identified Concerns:**Close case** | [ ]  Non-TAT Concerns:**Referral(s)** | [ ]  Unknown/On-going Threat:**Initiate TAT Case** |  |  |

**TRIAGE COMPLETED BY:**

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|  |  |  |  |  |  |       |
| Name |  | Position |  | Signature |  | Date |
|  |  |  |  |  |  |       |
| Name |  | Position |  | Signature |  | Date |

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| **Subject:**  | **Case:** |
| **PART III: THREAT ASSESSMENT KEY AREAS FOR INQUIRY** |  |

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| **SUBJECT Key Areas for Inquiry** |  | **Key Factors** |

|  |  |
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| **Is subject engaging in behaviors causing concern?** [ ]  Yes [ ]  No [ ]  Unknown **Concerns about nature, pattern, context, or change in frequency or intensity?** [ ]  Yes [ ]  No [ ]  Unknown  | [ ]  Others significantly impacted[ ]  Patterned occurrence continues[ ]  Changes in behavior/pattern |
| **Is subject engaging in concerning, aberrant & threatening communications?** [ ]  Yes [ ]  No [ ]  Unknown **Indicating grievances, ideation, intent, planning, preparation, or targets?** [ ]  Yes [ ]  No [ ]  Unknown  | [ ]  Directly Communicated Threats[ ]  Leakage[ ]  Multiple communication modes[ ]  Intent to engage in violence [ ]  Warning others |
| **Subject expressed motives and/or grievances with intended violence/harm?**  [ ]  Yes [ ]  No [ ]  Unknown  | [ ]  Immersion**Fixation?**[ ]  Grievances[ ]  Targets/sources[ ]  Violence |
| **Has the subject shown inappropriate interest in violence?** [ ]  Yes [ ]  No [ ]  Unknown  | **Identification?**[ ]  Incidents or perpetrators [ ]  Grievances of perpetrators[ ]  Weapons/tactics [ ]  Notoriety or fame [ ]  Violent Ideology |
| **Does subject have (or developing) the capacity to engage in violence?**  [ ]  Yes [ ]  No [ ]  Unknown  | [ ]  Violence Hx [ ]  Novel Aggression[ ]  Pathway behaviors?[ ]  Planning & research [ ]  Preparations [ ]  Surveillance, stalking, rehearsal[ ]  Energy Burst behaviors[ ]  Rapid Escalation/Imminence |
| **Subject experiencing/expressing hopelessness, desperation, and/or despair?** [ ]  Yes [ ]  No [ ]  Unknown  | [ ]  Last resort behaviors[ ]  JACA behaviors?[ ]  Justification [ ]  Alternatives (lack of) [ ]  Consequences [ ]  Martyrdom [ ]  Ability [ ]  Legacy token |
| **Subject’s behavior indicates need for intervention/support services?** [ ]  Yes [ ]  No [ ]  Unknown *Threat Assessment and Management Case Form — © Deisinger (2019); Licensed to Virginia Public Schools* | [ ]  Depressed mood[ ]  Hallucinations[ ]  Delusions[ ]  Extreme wariness/distrust[ ]  Martyrdom [ ]  Pervasive maladaptive behavior [ ]  Untreated symptoms of MI[ ]  Poor treatment compliance |
| **Does subject have protective factors or stabilizers that inhibit violence?** [ ]  Yes [ ]  No [ ]  Unknown **Subject has positive, trusting, sustained relationship with positive figure?** [ ]  Yes [ ]  No [ ]  Unknown Views violence as unacceptable, immoral: [ ]  Yes [ ]  No [ ]  Unknown Accepts responsibility for actions: [ ]  Yes [ ]  No [ ]  Unknown Demonstrates remorse for inappropriate behavior: [ ]  Yes [ ]  No [ ]  Unknown Respects reasonable limits and expectations: [ ]  Yes [ ]  No [ ]  Unknown Uses socially sanctioned means of addressing grievances: [ ]  Yes [ ]  No [ ]  Unknown Values life, job, relationships, freedom: [ ]  Yes [ ]  No [ ]  Unknown Fears loss of reputation, job, freedom, life: [ ]  Yes [ ]  No [ ]  Unknown Maintains, uses, and builds effective coping skills: [ ]  Yes [ ]  No [ ]  Unknown Treatment access, compliance, engagement: [ ]  Yes [ ]  No [ ]  Unknown  | [ ]  Few/no protective factors[ ]  Protective failures diminishing[ ]  Loss of key support |
| **Subject:** | **Case:** |
| **TARGET Key Areas for Inquiry** | **Key Factors** |
| **Are targets vulnerable, concerned, or impacted by subject’s behavior?** [ ]  Yes [ ]  No [ ]  Unknown  | [ ]  Significant impact/fear[ ]  Significant impart/fear[ ]  Availability, access, proximity[ ]  Vulnerability[ ]  Few protective/coping skills[ ]  Need for assistance |
| **ENVIRONMENTAL/SYSTEMIC Key Areas for Inquiry** |  |
| **Are there Environmental/Systemic factors that are impacting the situation?** [ ]  Yes [ ]  No [ ]  Unknown  | [ ]  School climate: bullying, bias[ ]  Systemic/procedural[ ]  Report latency/failure[ ]  Poor Conflict management [ ]  Unfair treatment[ ]  Inadequate resources[ ]  Adverse influences |
| **PRECIPITATING EVENTS Key Areas for Inquiry** |  |
| **Are there Precipitating Events that may impact situation?** [ ]  Yes [ ]  No [ ]  Unknown  | [ ]  Impending loss, failure, injustice[ ]  Key dates/events[ ]  Triggers/reminders[ ]  Views intervention as injustice[ ]  Contagion influence[ ]  Return from separation |
| **PROCESS INTEGRITY Key Areas for Inquiry** |  |
| **Are there concerns with consistency, credibility, or bias in information?** [ ]  Yes [ ]  No [ ]  Unknown  | [ ]  Poor credibility of subject[ ]  Poor credibility of sources[ ]  Inconsistency between sources[ ]  Significant gaps/unknowns |
| **Other Relevant Information:** |  |

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| **CURRENT CASE PRIORITY LEVEL:** |  |  |
| [ ]  **Critical/Imminent** | [ ]  **High** | [ ]  **Moderate** | [ ]  **Low** | [ ]  **Routine / None** |
| **Case Status:** |
| [ ]  No identified Concerns: **Close case** | [ ]  Non-TAT Concerns: **Referral(s)** | [ ]  On-going Threat: **Sustain TAT Case** |

**REFERRALS:**

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| **ASSESSMENT COMPLETED BY:** |  |  |  |  |  |
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| Name |  | Position |  | Signature |  | Date |
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| Name |  | Position |  | Signature |  | Date |
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| Name |  | Position |  | Signature |  | Date |

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| **Subject:** | **Case:** |
| **PART IV: INITIAL CASE MANAGEMENT PLAN** |
| **INTERVENTION/TASK** | **RESPONSIBLE PERSON** | **DATE DUE** |
| **Subject Interventions** |  |  |
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| **Target Interventions** |  |  |
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| **Environment Interventions** |  |  |
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| **INTERVENTION/TASK** | **RESPONSIBLE PERSON** | **DATE DUE** |
| **Precipitating Events (Monitoring/Interventions)** |  |  |
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| **Date for Next Review:** |
| Print name of Team Leader: |       | Date: |       |
|  |  |  |  |
| Signature of Team Leader: |       |  |  |
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| **Subject:** | **Case:** |
| **PART V: CASE UPDATE (to be updated regularly while case is active)** |
| **INTERVENTION/TASK** |
| **Subject** |
| **Updates:** | **Source** |
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| **Interventions** | **Responsible Person** | **DUE** |
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| **Target Interventions** |
| **Updates:** | **Source** |
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| **Interventions** | **Responsible Person** | **Due** |
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| **Environment Interventions** |
| **Updates:** | **Source** |
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| **Interventions** | **Responsible Person** | **Due** |
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| **Subject:** | **Case:** |
| **Precipitating Events (Monitoring/Interventions)** |
| **Updates:** | **Source** |
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| **Interventions** | **Responsible Person** | **Due** |
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| **Comments** |

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| **CURRENT CASE PRIORITY LEVEL:** |  |  |
| [ ]  **Critical/Imminent** | [ ]  **High** | [ ]  **Moderate** | [ ]  **Low** | [ ]  **Routine / None** |
| **Case Status:** | **Date for Review:** |
| [ ]  No identified Concerns: **Close case** | [ ]  Non-TAT Concerns: **Referral(s)** | [ ]  On-going Threat: **Sustain TAT Case** |  |  |

**REFERRALS:**

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| **Update COMPLETED BY:** |  |  |  |  |  |

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| Name |  | Position |  | Signature |  | Date |
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| Name |  | Position |  | Signature |  | Date |
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| Name |  | Position |  | Signature |  | Date |

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| **Subject:**  | **Case:** |
| **PART VI: CASE CLOSURE** |

[ ]  **The Threat Assessment Team has completed necessary interventions and actions regarding this case.**

[ ]  **The Level of Concern for this case is currently Routine/None or Low.**

[ ]  **If at a Low Level of Concern, remaining issues or tasks are being adequately addressed and monitored by relevant resources within the school or community at this time.**

[ ]  **Any relevant referrals have been made and those resources are engaged as needed.**

[ ]  **The full Threat Assessment Team has reviewed and concurred with all the following regarding the domains of assessment and intervention:**

**SUBJECT:**

**The subject is not known to be engaging in any behaviors that:**

[ ]  Is posing a threat of violence, harm, or significant disruption to self or others, or

[ ]  May reasonably pose a threat of violence, harm, or significant disruption to self or others, or

[ ]  Indicate a need for assistance or intervention.

**TARGET/Others:**

**Targets or others are not known to:**

[ ]  Have any significant ongoing concerns regarding their safety regarding this case

[ ]  Be engaging in any behaviors that place them at risk regarding this case

[ ]  Have any significant ongoing or further need for assistance or intervention.

**ENVIRONMENT/SYSTEMIC CONCERNS:**

**There are no known:**

[ ]  Environmental / systemic concerns significantly impacting this case currently.

[ ]  Environmental / systemic concerns that are reasonably likely to occur that would significantly impact upon this case, OR

**PRECIPITATING EVENTS:**

**There are no known:**

[ ]  Precipitating Events that are significantly impacting this case currently.

[ ]  Precipitating Events that are reasonably likely to occur that would significantly impact upon this case.

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| **THERE ARE NO FURTHER IDENTIFIABLE ACTION STEPS. THIS CASE HAS BEEN RESOLVED AND IS CLOSED** |

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| Name |  | Position |  | Signature |  | Date |
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| Name |  | Position |  | Signature |  | Date |
|  |  |  |  |  |  |       |
| Name |  | Position |  | Signature |  | Date |

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