

**INTAKE ASSESSMENT & CLIENT INFORMATION**

**Demographic Information**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

DOB: \_\_\_\_\_ Age: \_\_\_\_\_ Birthplace: \_\_\_\_\_ Gender: \_\_\_\_\_

Sexuality: \_\_\_\_\_ Race: \_\_\_\_\_ Ethnicity: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_

*Is it ok to leave a voicemail?* YES NO

Email: \_\_\_\_\_

*Would you like to receive email communication?* YES NO

*Is it ok to send something in the mail?* YES NO

How were you introduced to us? \_\_\_\_\_

*\* Please complete below for additional client*

Name: \_\_\_\_\_ Date: \_\_\_\_\_

DOB: \_\_\_\_\_ Age: \_\_\_\_\_ Birthplace: \_\_\_\_\_ Gender: \_\_\_\_\_

Sexuality: \_\_\_\_\_ Race: \_\_\_\_\_ Ethnicity: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_

*Is it ok to leave a voicemail?* YES NO

Email: \_\_\_\_\_

*Would you like to receive email communication?* YES NO

What are the 3 biggest concerns you have right now? How long has each been going on?  
\_\_\_\_\_  
\_\_\_\_\_

What solutions (helpful or unhelpful) have you tried to resolve your concerns?

---

---

---

Have you had therapy in the past? If so, with whom and when? What reasons did you attend therapy for? Please share with us about your experience. What was helpful? unhelpful?

---

---

---

What things would you like to see change in your life (family, career, health, relationships, etc.)?

---

---

Do you foresee any obstacles to achieving your goals or the desired changes?

---

---

Is there anyone that you would like to be a part of your sessions or think may be helpful to be part of sessions either now or in the future?

---

## **Medical & Wellness Information**

What do you do for wellness (i.e. healthy food choices, exercise, limits on TV/electronics/work, managing stress, family time, leisure, etc.)? Give examples:

---

---

How do you achieve balance in your life?

---

---

Have you ever received psychiatric services before? YES NO  
If yes, how long ago, with whom, for what, medications prescribed and results:

---

---

Do you have any current or past medical issues, hospitalizations, accidents, injuries or surgeries? If yes, what?

---

---

Is there a family history of the above medical issues/concerns?

---

---

Are you presently under a physician's/psychiatrist's care? If so, for what reason?

---

---

Is there anyone in your life that is currently dealing with a medical issue that you are concerned about? If so, whom, for what?

---

---

In the past year, have there been any changes in your life? (i.e.: moves, appetite, sleep, health, family, mood, overall functioning)?

---

---

List any medications (over-the-counter & prescribed), nutritional or herbal supplements, or alternative treatments (acupuncture, chiropractic, etc.) you are taking/doing and the reasons:

---

---

### **Important Questions We Must Ask**

Have you ever had thoughts of killing yourself? YES NO  
If yes, please explain:

---

---

Have you ever attempted to kill yourself? YES NO  
If yes, please explain:

---

---

Has anyone in your family or close to you died by suicide? YES NO

If yes, please explain: \_\_\_\_\_  
\_\_\_\_\_

Have you ever felt you wanted to seriously harm or kill someone else? YES NO

If yes, please explain: \_\_\_\_\_  
\_\_\_\_\_

Do you have weapons in your home or access to weapons? YES NO

If yes, who has access to them and what are the safety protocols around them? \_\_\_\_\_  
\_\_\_\_\_

Is there any history or presence of abuse or violence? YES NO

If so, please explain: \_\_\_\_\_  
\_\_\_\_\_

Are you currently using any illegal drugs or prescription medications in a way other than was prescribed, or is the reason you are seeking therapy services substance related?

\_\_\_\_\_  
\_\_\_\_\_

Have you ever witnessed or experienced a trauma? Do you have reoccurring nightmares, flashbacks, or do you avoid anything that is uncomfortable or painful? If so, please explain:

\_\_\_\_\_  
\_\_\_\_\_

Do you have currently legal issues or is the reason you are seeking therapy related to a court order? If so, please explain?

\_\_\_\_\_  
\_\_\_\_\_

## **Career/Job, Recreation and Leisure**

What is your current occupation? How would you describe your fulfillment of your job/career?

\_\_\_\_\_  
\_\_\_\_\_

What is your highest level of education completed and field of study?

\_\_\_\_\_

What do you enjoy doing during your free/leisure time?

---

---

## **Intimate Relationships**

If you are currently in a relationship, describe your relationship:

---

---

How would you describe your communication?

---

---

## **Understanding Your Family & Influences**

Parent's marital status:

Married   Divorced   Never Married   Separated   Domestic Partners   Widowed

Please describe your relationship with your parents:

---

---

How would you describe your upbringing?

---

---

Who lives with you currently?

---

---

Do you have any pets? If yes, names, types and relationship to each pet:

---

---

Describe your relationship with the following:

Mother:

---

---

Father:

---

---

Mother's Significant Other:

---

Father's Significant Other:

---

Siblings: Age, Name and Sex:

a. Sibling 1

---

b. Sibling 2

---

c. Sibling 3

---

Children:

a. Child 1

---

b. Child 2

---

c. Child 3

---

Significant Other/Spouse:

---

## Relationships

Who would you say your support system is (people, organizations, or affiliations)?

---

---

Do you belong to any religious or spiritual groups? YES NO  
If yes, what is your level of involvement?

---

How do your religious or spiritual beliefs/practices influence your life?

---

---

Please list anything else that is important for us to know about you that would assist us in working with you to achieve your desired results: