

Intake Assessment

Client's Date of Birth / Age / Gender			
Last	First	Middle	
DOB (mm/dd/yyyy)	Age	Gender (circle one) Male Female	
Client Contact Information			
Street Address	City	State	Zip
Home Phone ()	Cell Phone ()	Work Phone ()	
E-mail	Primary Phone Number (circle one) Home / Cell / Work / Other: _____		

Insurance & Funding			
(circle all that apply) Insurance / Cash		Insurance Company	
Client's Member # (Insurance)	Insurance Group #		
Primary Holder's Name	Is there another health benefit plan? Yes No	Co-Pay Per Visit & \$ _____	
Primary Policy Holder's Employer	Primary Policy Holder's DOB (mm/dd/yyyy)	Primary Policy Holder's SSN #	

Primary Providers		
Psychiatrist Name	Psychiatrist Address	Psychiatrist Phone ()

Emergency Contacts				
Name	Relationship	Cell #	Work #	Home #
Name	Relationship	Cell #	Work #	Home #

Current Medications (Medical or Psychiatric)			
Medication	Dosage	Frequency	Reason
1) _____			
2) _____			
3) _____			
4) _____			
5) _____			
6) _____			
Allergies			
1) _____	2) _____	3) _____	

Hospitalizations				
(Medical)	Date	Reason		
(Psychiatric)	Date	Length of Stay	Hospital Name	Reason

Personal and Family History	
Highest Level of Education	Current School
Father's Highest Level of Education	Mother's Highest Level of Education

Relationships		
Relationship Status	Partner's First Name	Number of Years Together
	Number of Shared Children	
Are you Employed?	What do you do for a Living?	

Family Information						
Father	Name	Biological or Adoptive?	Age	Occupation	Do you have Contact? Yes No	(Circle One) Living / Deceased
Mother	Name	Biological or Adoptive?	Age	Occupation	Do you have Contact? Yes No	(Circle One) Living / Deceased
Parents Marital Status	(Circle One) Married Divorced Separated				Length of Time	

Step-Parents	Name	Age	Occupation	(Circle One) Living / Deceased
				Living / Deceased
Siblings and/or Stepsiblings	Name	Age	History of Mental Illness? (if yes, specify	

Significant Family Psychiatric History

Client's Substance/Alcohol History & Daily Usage				
Most Recent Use/ of drug and/or Alcohol	Drug (s) of Choice	Drink to Blackout? Last time? Yes No	History of Seizures Yes No	
Most Recent Period of Sobriety	Family Hx of Substance Abuse? Who?	IV Drug Use Yes No		

Have you ever been to Detox/Rehab?			
Dates	Facility	Completed?	(If no, why)

Legal History			
History of DUI / DWI	Date of Arrest / Probation Period	Court Ruling	Comments (weapons, drugs, BAC, etc)
Pending Charges			
Other Charges from Past			

Reason for Coming In for Counseling

Previous Therapists		
Name	Dates	Reason

Current Risks			
Any Suicidal Ideation/Intent	(Circle One) Yes No	When was last time and for how long?	
Self –Harm	(Circle One) Yes No	If yes, please explain	Availability and Means
Homicidal Ideation	(Circle One) Yes No	If yes, execute “duty to warn”	
Hx of Violence	(Circle One) Yes No	If yes, explain	
Client’s Signature			Date:
Therapist’s Signature		Date	