

INTAKE & CLIENT INFORMATION

Demographic Information

Name: _____ Date: _____

DOB: _____ Age: _____ Administrative Sex: _____ Gender: _____

Pronouns: _____ Sexual Orientation: _____ Race: _____

Ethnicity: Latino/Hispanic Not Latino/Hispanic

Street Address: _____

City: _____ State: _____ Zip Code: _____

Phone Number(s): _____

Is it ok to leave a detailed message? YES NO

Is it okay to text? YES NO

Email: _____

Is it okay to send email communication? YES NO

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

How did you find me? _____

Reasons for Seeking Therapy

Please list the 3 biggest problems/concerns/issues you have right now.

Primary Concern: _____

Mild Moderate Severe Intermittent

Onset: _____

Getting Worse Getting Better No Change

Solution/coping skills you have tried to manage/resolve this concern:

Second Concern: _____

Mild Moderate Severe Intermittent

Onset: _____

Getting Worse Getting Better No Change

Solution/coping skills you have tried to manage/resolve this concern:

Third Concern: _____

Mild Moderate Severe Intermittent

Onset: _____

Getting Worse Getting Better No Change

Solution/coping skills you have tried to manage/resolve this concern:

Do you feel you have some control over your present situation? _____

Have you had therapy in the past? _____

If yes, was it helpful & how? _____

Mental Health Information

	Yes	No
Have you been previously diagnosed with a mental health disorder?		
Have you received psychiatric services in the past?		
Do you have recurring nightmares or flashbacks?		
Did you experience any developmental delays growing up?		
Have you ever been treated for drug and/or alcohol dependency?		
Are there any addictive behaviors present?		
Do you currently use recreational drugs?		
Do you participate in risky behaviors?		
Have you ever or do you currently hear voices/see things others do not hear/see?		
Have you ever or do you currently have delusions?		
Have you ever been diagnosed with ADD/ADHD?		
Have you suffered from any recent losses?		
Do you tend to isolate from others?		

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	Yes	No
Do you tend to avoid anything that is uncomfortable or painful?		
Are you generally impulsive?		
Do you struggle to feel pleasure?		
Do you have rapid mood swings?		
Do you tend to be indecisive?		
Do you feel you have good problem-solving skills?		
Do you struggle asking for help when needed?		
Are you hopeful about the future?		
Do you feel life is meaningful?		

Are you currently receiving psychiatric services? _____

If yes, please list name, address, and phone numbers of providers:

Please list any psychiatric hospitalizations; places, dates, reason:

Please explain what your life purpose is:

Important Questions We Must Ask

	Yes	No
Have you ever had thoughts of killing yourself?		
Have you ever planned on killing yourself?		
Have you ever attempted to kill yourself?		
Are you having current suicidal ideation?		
Has anyone in your family or close to you died by suicide?		
Have you ever or are you currently self-harming (cutting, burning, etc.)?		
Have you ever felt you wanted to seriously harm or kill someone else?		
Are you having current homicidal ideation?		

	Yes	No
Are there weapons in the home?		
Do you have access to weapons?		
Do you have a history of abuse or violence?		
Is there any current abuse or violence present?		

Medical/Wellness

Do you currently have a primary care provider? YES NO

If yes, please list name, address, and phone number of your primary care provider:

Are you currently under a physician's care? YES NO

How would you rate your physical health? Excellent Good Fair Poor

Last Physical Exam Date: _____ Last Pap: _____

Last Mammogram: _____ Last Prostate Exam: _____

Height: _____ Current Weight: _____

	Yes	No
Are you interested in losing or gaining weight?		
Have you lost or gained weight in the past 6 months?		
Have you lost or gained weight in the past year?		
Do you use contraceptives?		
Have you ever or do you currently smoke, vape, or use chewing tobacco?		
Do you wear contacts or glasses?		
Do you have any allergies or sensitivities?		
Were you breastfed?		
Did you take antibiotics as a child?		
Do you tend to overeat, binge, or restrict food?		
Do you participate in any form of fasting?		
Have you or are you currently participating in a detox method/program?		
Do you consume caffeinated beverages?		
Do you consume sweetened beverages?		
Do you use artificial sweeteners?		

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	Yes	No
Do you consume alcohol?		
Do you have trouble sleeping?		
Do you wake up feeling rested?		
Do you exercise regularly?		
Do you suffer from any chronic pains or aches?		
Have you ever experienced a head trauma?		
Have you seen any specialists in the past?		
FEMALES ONLY		
Are you or could you be currently pregnant?		
Are you in perimenopause or menopause?		
Are you experiencing any menopausal symptoms?		
Did you experience any birth complications with any of your children?		
Have you ever had an abortion?		
Have you ever had a miscarriage?		

Are you currently seeing any specialists? _____

If yes, please list name, address, and phone numbers of providers:

List any surgeries including dates:

List any serious accidents including dates:

Place of Employment: _____ Work Number: _____

Current occupation/position? _____

How long have you been in your current position? _____

How many hours each day do you work? _____

Household gross monthly income: _____

Job Satisfaction:	Excellent	Good	Fair	Poor
Do you have a financial budget?			YES	NO
Have you ever served in the military?			YES	NO
Highest level of education:	Less than 12 th Grade		GED	
	Graduated High School		Some College	
	Associates		Bachelors	
	Masters		Doctorate	

Name of High School: _____

Name of College: _____

Major/Minor in College: _____

Average grades in school:	A	B	C	D	F
Do/did you participate in extra-curricular activities?				YES	NO
Have you ever had any learning problems or disabilities?				YES	NO

Recreation and Leisure

Do you have a daily self-care practice? YES NO

How many times do you practice a form of relaxation per week? _____

How many times do you eat out per week? _____

How many vacations do you take each year? _____

When was your last vacation? _____

Do you feel you have balance in your life? YES NO

Do you manage time well? YES NO

Do you have hobbies and/or interests? YES NO

Which social media sites do you use:	Facebook	Twitter
	Linkedin	Instagram
	Snapchat	TikTok
	Other: _____	

How much time on average do you spend on social media each day? _____

Intimate Relationships

Current Marital Status:	Married	Divorced	Never Married
	Separated	Widowed	Living Together

Number of Marriages: _____ Length of Recent Marriage: _____

Relationship Satisfaction:	Excellent	Good	Fair	Poor
Sex Satisfaction:	Excellent	Good	Fair	Poor
Communication:	Excellent	Good	Fair	Poor

Please describe your current or most recent relationship:

Family

Names, relationships, and ages of others currently living in the home:

How many dependents do you have? _____

How many children do you have? _____

Do you have any pets? YES NO

Parent's marital status:	Married	Divorced	Never Married
	Separated	Widowed	Living Together

Please indicate the **current** relationship you have with your

Mother:	Close	Distant	Strained	Non-Existent	Deceased
Father:	Close	Distant	Strained	Non-Existent	Deceased
Siblings:	Close	Distant	Strained	Non-Existent	Deceased

Please describe the relationship you had with your mother growing up:

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Please describe the relationship you had with your father growing up:

If applicable, please describe the relationship you had with any stepparents growing up:

How many siblings do you have? _____

Birth Order: _____

If applicable, please describe the relationship you had with any siblings growing up:

Were you ever adopted? YES NO

Were you ever in foster care? YES NO

Please describe your upbringing/childhood: (Did your parents work, if so who watched you? Were your parents strict or not? Did you have a lot of rules and responsibilities? Were your parents involved? Did you play sports or belong to any clubs? Did you have friends? Did you go to church? Etc.)

Please describe your family's history of **medical** issues or hereditary diseases:

Please describe your family's history of **mental health** concerns:

Please describe your family's history of substance use/alcohol issues:

If applicable, please describe your family's history of legal issues:

Social Supports

Please describe your current friendships:

- | | | |
|--|-----|----|
| Do you have any social supports? (clubs, agencies, or community organizations) | YES | NO |
| Do you belong to any religious or spiritual groups? | YES | NO |
| Do you actively participate in any spiritual/religious practice(s)? | YES | NO |
| Do you have any past legal issues/concerns? | YES | NO |
| Do you have currently legal issues/concerns? | YES | NO |

Change is Coming...

What are your expectations from therapy?

What are your expectations of the therapist?

Looking into the future, how will you know that our work and time together has been worth it?

List concrete changes you will see:

Do you foresee any obstacles to achieving your goals or the desired changes? YES NO

How long do you think therapy will need to last to achieve your goals? Write down a target date:

List 5 strengths about yourself or that others say about you:

1. _____
2. _____
3. _____
4. _____
5. _____

Please complete the following sentence:

I am _____, people are _____, and the world is _____.

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: