Intake Form

This is an outline for the intake evaluation, listing sub-headings in areas of information that should be included in each intake evaluation as a minimum data base. Additional information may be required by your supervisor and/or site.

1. Identifying information.
   Name, date of birth, town of residence, age and current status (e.g., job, grade, etc.)

2. Date of the intake evaluation.

3. Referral source and relationship to referred.

4. Referral problem.
   Identify the problem in behavioral/objective terms as the referral source(s) view it. If, for instance, the parents and the school differ on the referral problem, both viewpoints should be stated and ascribed explicitly to that person or those persons.

5. History of problem/strengths
   Include a brief statement describing the nature, extent, frequency, etc. of the problem as well as a brief chronological history of its development. Also, included here may be a description of any accompanying physical symptoms, specifically those related to the identified problems, changes in grades and/or school achievement, job history, etc. Describe psychological and interpersonal strengths and resources of the client.

6. Social history.
   Provide a brief description of the nature of the client's current social life, social skills, cultural and linguistic background, activities enjoyed, nature and number of friendships, and the nature of academic adjustment.

7. Family history.
   Include a family constellation identifying all members of the family, with order of children, and members currently living in the client's household. Include a statement describing the nature of any intimate relationships the client currently has or previously has had. A brief statement giving the parents' education, financial and occupational status is desirable. Furthermore, if there is a history of psychiatric, psychological or medical disorders in other family members, it should be noted here.

8. Occupational history.
   Include a brief description of the nature of the client's past and present jobs, including reasons for job change as well as a description of interpersonal relationships with peers, subordinates and supervisors. (If the client is school age, describe his/her school history.)

9. Medical history.
   State the health and medical status of the client, the date of the last complete physical examination, the name of the physician who performed the last physical examination and who provides ongoing medical care. The presence of any significant physical symptomatology or medical illness should be noted here.