



Intake Information

Date: _____

Name: _____ Spouse/Partner's Name: _____

Address: _____ City _____ Zip _____

Date of Birth _____ Age _____

Primary Phone number : _____ Cell Home OK to leave msg? Yes No

Email address _____ OK for paperwork and/or correspondence? Yes No

Insurance Carrier _____ Insured's name _____ DOB: _____

1. Sex Male Female

2. Marital/Relationship Status

- Single (never married)
- Significant Other
- Cohabiting (living together)
- First Marriage
- Separated
- Divorced
- Widowed
- Remarried (after divorce)
- Remarried (after spouse's death)

3. Current Employment

- Full-time
- Part-time
- Homemaker
- Unemployed
- Full-time student
- Part-time student
- Retired

4. Education

- grade school/junior high
- attending/attended high school
- High school graduate
- Attending/attended college
- College graduate
- Attending/attended graduate school
- Technical school degree
- Graduate degree (Masters)
- Graduate degree (Doctoral)

5. Children (include biological, adopted, foster, step, etc)

Name	Sex	Age	Type (bio,step,etc.)	Custody?
_____	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No

6. Race/Ethnicity

- Caucasian Native American Latin or Spanish Asian African American Multiracial Other _____

7. Language spoke in the home other than English _____

8. Primary Care Info: (Name and Phone #) _____

If Currently under physician's care please indicate what for (and Physician's or Psychiatrist's name if different than PCP)

List current medications and amounts _____

Do you want us to coordinate care with your physician? Yes No



Initial Service Plan

Please check any of the reasons listed below which resulted in your coming in today:

- | | |
|---|---|
| <input type="checkbox"/> Depression or Anxiety | <input type="checkbox"/> Blended Family Adjustment |
| <input type="checkbox"/> Alcohol or other drug abuse | <input type="checkbox"/> Divorce |
| <input type="checkbox"/> Marital Problems | <input type="checkbox"/> Life/Medical Stressors |
| <input type="checkbox"/> Communication Difficulties | <input type="checkbox"/> Family Counseling |
| <input type="checkbox"/> Improved Sexual Relations | <input type="checkbox"/> Relationship Enhancement |
| <input type="checkbox"/> Sexual Orientation Questions | <input type="checkbox"/> Adoption |
| <input type="checkbox"/> Child Adjustment/Parent Conflict | <input type="checkbox"/> Individual Counseling/Self growth |
| <input type="checkbox"/> Thinking of harming self or others | <input type="checkbox"/> Pre-marital Counseling |
| <input type="checkbox"/> Abuse (physical/verbal/sexual) | <input type="checkbox"/> School/Work adjustment problems |
| <input type="checkbox"/> Difficulty with loss or death | <input type="checkbox"/> Weight/Body Image/Eating behaviors |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

What event happened which made you think "I am (we are) calling a therapist?" _____

Please explain what you are hoping to achieve through the use of counseling services:

What behaviors would you like to change? _____

How would you know if things were getting better? _____

Specific Goals identified after first session (to be completed with therapist) Plan Review Date: 6 months from intake

Patient Signature _____ Date _____

_____ Date _____

Therapist Signature _____ Date _____

Yami Martinez-Lewis, MPH, M.S., LAMFT 6660T

Supervisor Signature _____ Date _____

Dr. Nancy Frigaard, D.Min., LMFT - 15231



Have you received prior counseling? Y or N related to these problems? _____ Other _____

If yes and related, was it: Outpatient Inpatient (hospitalization)

When: _____ Where: _____

Counselor/Doctor: _____ Length of Treatment: _____

Problem(s) treated: _____

Outcome: Very Successful Somewhat Successful Stayed the Same Somewhat Worse Much Worse

If Other, was it: Outpatient Inpatient (hospitalization)

When: _____ Where: _____

Counselor/Doctor: _____ Length of Treatment: _____

Problem(s) treated: _____

Outcome: Very Successful Somewhat Successful Stayed the Same Somewhat Worse Much Worse

Any health issues that you are managing (including sleep, eating habits, drug or alcohol use) _____

Family History of mental illness? (if yes, please describe) _____

Person to contact in case of an emergency (*limited information will be given, enough to get you the care you may need at that time*):

Name _____ Relationship _____

Phone _____