Intake Checklist

During an intake session with a new client, a therapist will typically ask a series of questions to gather essential information and gain a better understanding of the client's needs, concerns, and background.

There are many questions you can ask your client during the intake session, and determining which questions are the “right questions” will depend on what the client is struggling with. Some questions are appropriate for any intake session, no matter what problem or issue your client presents with.

Here are some common questions a psychologist might ask:

- Can you tell me what brings you here today?
- Have you ever been in therapy or counseling before? If so, please describe your previous experiences.
- What are your current symptoms or challenges? How long have you been experiencing them?
- What makes the problems or challenges better?
- Are there specific situations or triggers that seem to worsen your symptoms or distress?
- If you could wave a magic wand, what positive changes would you make happen in your life?
- Overall, how would you describe your mood?
- What do you expect from the counseling process?
- Can you provide some background information about your family and upbringing?
- What is your current living situation, and who is in your immediate support network?
- Have you experienced any recent major life changes or stressful events?
- Are you currently taking any medications or receiving medical treatment for any conditions?
- Do you have a history of mental health diagnoses or treatment for mental health issues?
- Are you experiencing any thoughts of self-harm or suicide?
- How do you cope with stress or difficult emotions? Are there any coping strategies that you've found helpful?
- Do you have any concerns related to substance use or addiction?
- Are there any legal or financial issues that you would like to discuss?
- Are there cultural, religious, or spiritual beliefs that are important to you?
- What are your goals for therapy, and what do you hope to achieve through the process?
- Is there anything specific you would like to tell me about your personal history, experiences, or concerns that you think is important for me to know?
- Do you have any questions or concerns about the therapy process, confidentiality, or what to expect from our sessions?
- Are there any preferences or considerations related to your treatment, such as the type of therapy you're interested in or your availability for sessions?
- What would it take to make you feel more content, happier, and more satisfied?

- Describe a typical day for you.
- What strategies have you already used to try and solve the problem?
- What would you like to get out of counseling? How will you know you are ready to finish?
- Have you ever been arrested?

Other questions you will ask your clients during the intake appointment:

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As you organize resources for your intake process, it might feel a bit overwhelming. To help you keep everything organized, it might be a good idea to use a checklist. This checklist can help you gather relevant information to better understand the client's psychological and emotional well-being. Here's a sample intake checklist:

_____ Personal Information

- Full name
- Date of birth
- Contact information (address, phone, email)
- Emergency contact information

_____ Referral Source

- How did you hear about our services?
- Have you been referred by a doctor, therapist, or another professional?

_____ Presenting Issues/Problems

- Describe the main reason for seeking therapy.
- When did these issues start, and how have they progressed?

_____ Personal History

- Family background and dynamics
- Educational history
- Employment history
- Marital/relationship history
- Medical history
- Previous therapy or counseling experiences

_____ Mental Health History

- Any previous diagnoses or mental health conditions

- Current or past medications
- History of hospitalizations or crisis interventions

_____ Substance Use

- Alcohol and drug use history
- Current substance use, if applicable

_____ Legal or Financial Issues

- Any legal or financial concerns

_____ Trauma and Life Events

_____ History of Traumatic Experiences

- Recent significant life events or stressors

_____ Symptoms

- Specific psychological symptoms (e.g., anxiety, depression, panic attacks)
- Duration and severity of symptoms
- Triggers and coping strategies

_____ Social Support

- Current support network (family, friends)
- Relationship satisfaction

_____ Goals for Therapy

- What do you hope to achieve through therapy?
- Any specific goals or expectations?

_____ Cultural and Spiritual Considerations

- Cultural background and values
- Spiritual or religious beliefs

_____ Treatment History

- Previous therapeutic approaches that have been helpful or unhelpful

_____ Self-Harm or Suicidal Thoughts

- Any history or current thoughts of self-harm or suicide

_____ Consent and Confidentiality

- Discuss the limits of confidentiality and the client's rights

_____ Payment and Insurance

- Payment options and insurance coverage, if applicable

Completion of Forms

- Informed Consent
- Records Release (if applicable)
- Online Intake Forms
- Insurance Information (if applicable)
- HIPAA Notice/Privacy Policies
- Other: ____
- Other: ____
- Other: ____
- Other: ____

You might need more forms or resources; in which case you can add them to this list.

Next Steps

- Discuss the therapy process and scheduling future sessions

This checklist provides a structured way to collect essential information during an intake session, but it can be customized to fit your specific needs and preferences. It is important to create a safe and supportive environment during the intake process, allowing the client to share their thoughts and concerns openly.