

Table. 3.1
Common Intake Information Gathered

Demographic and background information	Name, date of Birth (age), race/ethnicity, spiritual/religious background, level of education, current work/student status, economic status, current living arrangements
Primary presenting concern	What brings clients to therapy from their perspective
Development and life history	Developmental milestones, school adjustment and milestones, childhood relationships, internalizing/externalizing behaviors of concern, family relationships and dynamics (e.g., parents/caregivers, siblings, close relatives), significant life events
Medical and mental health history	Significant medical events/complications; past mental health, prescribed or non-prescribed medications, substance use and abuse, criminal history/current legal involvement, family medical and psychiatric history
Interpersonal relationships	Relationship (romantic) history, current relationship status (e.g., long-term relationship, casual, married, divorced), peer relationships, colleague relationships, family relationships, children
Current presentation	Physical appearance (e.g., dressed groomed), motor activity (e.g., restless, sluggish, tics), attitude (e.g., standoffish, eager to please), speech (e.g., pressured, loquacious, slurred), memory (e.g., recent, remote, immediate), thought perception/content and concentration (e.g., coherent, tangential, disconnected, delusional, insightful), intellectual level (includes awareness of social events), orientation (aware of person, place, time), mood (e.g., agitated, depressed, anxious, apathetic, euthymic, euphoric), and affect (e.g., full range, blunted, flat, inappropriate, labile)
Strengths/assets	What clients are good at doing or enjoy (e.g., exercise, music, writing); personality qualities (e.g., conscientious, compassionate, optimistic); anything (or person) in clients' lives that can be a protective factor (e.g., supportive family member, stable job, available social network), sociocultural factors (e.g., extended family, spirituality)
Contributing negative sociocultural factors	Poverty/homelessness, discrimination, immigration status, dangerous community