Demographics	
Client Name:	Date:
Current Address:	Phone #: () -
Street	
City/State	
Zip Code	
Date of Birth:	Marital/Relationship Status:
Nation/Tribe/Ethnicity:	
Primary language of client:	Secondary:
Referral Source:	Phone:
Emergency Contact:	Phone:
Primary language of client: Referral Source:	Phone:

Critical Population (choose all that apply)

Funding Source	Residential	Legal Involvement	
Food Stamp Recipient	Homeless	Protective Services (APS/CPS)	
TANF Recipient	Shelter Resident	Court Ordered Services	
SSI Recipient	Long Term Care Eligibility	On Probation	
SSDI Recipient	Long Term Care Resident	On Parole	
SSA (retirement) Recipient		On Pre-Release	
Other Retirement Income	Disability	Mandatory Monitoring	
Medicaid Recipient	Physical Disability		
Medicare Recipient	Severely Mentally III	Other	
General Assistance	SED	Currently pregnant	
	Developmentally Disabled	Woman w/dependents	
	Chronically Mentally III		
	Regional Behavioral Health Authority		
	Contact Information		
(Secu	re consents for agency contacts, whe	n possible)	
Name of Caseworker	Agency	Phone number	

Family Relationships

Does the client have any cl					· · · · · · · ·	
Name	Age	Date of Birth	Sex	Custody? Y/N	Lives with?	Additional Information
Who else lives with the clie friends)						
Name		Sov		ationchin	A dditiono	
Name	Age	Sex	IVER	ationship	Auditiona	I Information
Name				attoriship		Imornation
Name						I Information
						Information
Primary language of house					Secondary:	

Client's/Family's Presentation of the Problem: Client's/Family's Expected Outcome:

Physical	Yes	No
Client states that he/she has an exercise program. Optional - Physical		
Fitness		
Client reports appropriate interventions taken when experiencing illness or		
injury.		
Client engages in preventive medicine activities such as breast or testes self-		
examination.		
Client receives an adequate amount of sleep. If No, explain below in		
Comments section		
Client avoids the use of tobacco products or exposure to second-hand smoke.		
If NO, complete Behavioral Assessment		
Client consumes no more than two alcoholic drinks per day. If NO, complete		
Behavioral Assessment		
Allergies (Medication and Other):		
Additional Information:		

Nutrition

Г

Nutritional Status: Current Weight Curre	ent Height BMI
Appetite: Good Fair	Poor, please explain below
Recently gained/lost significant weight	Binges/overeats to excess
Restricts food/Vomits/over-exercises to avoid weight	ht gain 🛛 Special dietary needs
Hiding/hording food	Food allergies
Comments	

Pain Questionnaire

Pain Management:	Is the client in pain now? Yes No If yes, ask client to rate the pain on a scale of 1-10 (with 10 being the severest) and enter score here
	Is the client receiving care for the pain? Yes No If no, would the client like a referral for pain management? Yes No

Child/Adolescent Growth & Development

During pregnancy, did the biological mother have any of the following (select all that apply)?					
Amniocentesis	🗌 Anemia	Diabetes Melllitus			
Emotional Problems	Excessive weight gain	German Measles			
High blood pressure	🗌 High fever	Kidney problems			
No prenatal care	🗌 Placenta Previa	Premature labor			
Vaginal bleeding	Vaginal infection	Other infection			
Unknown	Other:				
During pregnancy, did the mothe	er use any of the following (select	all that apply)?			
Tobacco Alco	hol Street Drugs	Unknown			
Comments (frequency and intensity of use, participation in treatment, birth defects or malformations due					
to drug/alcohol use among siblings):					

Т

Any problems with labo	r &/or del	livery?		
Anger Scores?				
Apgar Scores?				
Did the baby have any c	f the foll	owing after deliv	very (select all that a	oply)?
Anemia	🗌 Apne	a	Birth defects	Blood transfusions
Bradycardia		around neck	Eye problems	Fever/low temperature
Hernia	Hydr	ocephalus		Intensive Care
Intracranial bleed	Jitter		Physical injury	Seizures
Surfactant	Troul	ble breathing	Trouble sucking	1 of multiples (twin, etc)
Use of Oxygen	🗌 Venti		Vellow Jaundice	Other:
			· —	L
Developmental Mileston	es – plea	se select any th	at the client did late	or is still having trouble with:
Rolling Over (2-6 mon	ths)	Sitting (6-12	months)	Standing (8-16 months)
Walking (8-16 months))		ers (24-36 months)	Toileting (24-36 months)
Dressing self (24-36 m	ionths)	Feeding Self		Sleeping alone
Tolerating separation		Playing coop	eratively	Speaking
Are immunizations up to	o date?	Yes	No No	
Has the client had any c				
	emia			Bruising
	nfusion		laches	Coordination Problems
	scle Wea			
	s (motor/\			
GI Problems: Constig		Diarrhea		
Heart/Lung Problems:	Asthma		Murmur Surger	
		y Thyroid <en pox<="" th=""><th>Early Puber</th><th>ty Late Puberty</th></en>	Early Puber	ty Late Puberty
Infections:				
	Meni	fevers	Whooping Cougl	n Encephalitis
Mumps	oken Bon		Stitches	
Kidney Problems:	Bed we		ytime wetting	
Muscle/Bone Problems:			Spasticity	Other:
Poisoning: Chem			Opasticity	Other.
	Hearing		Tactile	
	Birth Cont	<u> </u>	Masturbation	
	cne	Birth Marks		
Comments:				

Family History

Family History of (select all that apply):						
	Mother	Father	Siblings	Aunt	Uncle	Grandparents
Alcohol/Substance Abuse						
History of Completed Suicide						
History of Mental Illness/Problems						
such as:						
Depression						
Schizophrenia						
Bipolar Disorder						
Alzheimer's						
Anxiety						
Attention Deficit/Hyperactivity						
Learning Disorders						
School Behavior Problems						
Incarceration						
Other						
Comments:						

Yes	No

Legal History

Past or current legal problems (select all that apply)?						
	Gangs					
Arrests	Conviction	Detention				
🗌 Jail	Probation	Other				
If yes to any of the above, please	explain:					
Any court-ordered treatment?	Yes (explain below)					
Any court-ordered treatment? Ordered by	Yes (explain below) Offense	No Length of Time				
	· · · ·					
	· · · ·					
	· · · ·					

Functional Assessment					
Functional Assessment:					
Is client able to care for him/herself? 🗌 Yes 🔄 No If No, please explain:					
		Situation:			
Housing Adequate	Housing Dangero				
Dependent Upon Othe	rs Incarcerated	Ward of State/Trib	al Court		
Additional Information:					
	Needs assistive or adap	tive devices (select all that			
🗌 None	Glasses	Walker	🗌 Braille		
Hearing Aids	Cane	Crutches	🗌 Wheelchair		
Translated Written Info			er:		
Does client have a history	of falls? Yes N	lo Explain:			
Child/Adolescent Educa	tional Assessment				
Current educational sett	ing:				
Public	Tribal	Boarding	Charter		
Private	Home	BIA	Vocational		
Alternate	GED		Other		
			•		
Current grade level:	Skipped a grade	or 🗌 been held back?			
Any testing for an IEP (In			No		
History of /or current pla			ours per day?		
For learning proble		For behavior problem			
History of hyperactivity a		No Comment:			
Ever been expelled or su		No Reason:			
•	• —				
School attendance problems: 🗌 Yes 🗌 No Comments:					
Other education-related					
Leisure & Recreation					

Which of the following does the client do? (Select all that apply)					
Spend Time with Friends	Sports/Exercise				
Classes	Dancing				
Time with Family	Hobbies				
Work Part-Time	Watch Movies/TV				
Go "Downtown"	Stay at Home				
Listen to Music	Spend Time at Clubs/Bars				
Go to Casinos	Other:				
What limits the client's leisure/recreational activities?					

Family Social History

Describe family relationships & desire for involvement in the treatment process:

Perceived level of support for treatment? (scale 1-5 with 5 being the most supportive)

Psychological	Yes	No
Client accepts responsibility for creating his/her own feelings.		
Client accepts responsibility for his/her own actions.		
Client makes decisions with a minimum of stress and worry.		
Client is able to express feelings of anger, disappointment, frustration, etc.		
Client reports a stable emotional life.		
Client feels enthusiastic about his/her life.		
Client reports adequate energy level.		
Client reports sleep is restful & adequate.		
Client reports he/she feels positive about self.		
Comments:		

Bereavement/Loss & Spiritual Awareness

Please list significant losses, deaths, abandonments, traumatic incidents:						
Spiritual/Cultural Awareness & Practice						
Knowledgeable about traditions, spirituality, or religion? Yes No Comment:						
Practices traditions, spirituality, or religion? Yes No Comment:						
How does client describe his/her spirituality?						
Does client see a traditional healer? Yes No Comment:						

Behavioral Assessment

Abuse/Addiction – Chemical & Behavioral						
Drug	Age First Used				Date Last Used	
Alcohol						
Cannabis						
Cocaine						
Stimulants (crystal, speed, amphetamines,						
etc)						
Methamphetamine						
Inhalants (gas, paint, glue, etc)						
Hallucinogens (LSD, PCP, mushrooms, etc)						
Opioids (heroin, narcotics, methadone,						
etc) Sedative/Hypnotics						
(Valium, Phenobarb, etc) Designer Drugs/Other						
(herbal, Steroids, cough						
syrup, etc)						
Tobacco (smoke, chew)						
Caffeine						
Ever injected Drugs?	Yes	s 🗌 No	If Yes, Which one	s?		
Drug of Choice?						
Consequences as a R	esult of Dru	g/Alcohol Use (select all that apply)			
Hangovers] DTs/Shakes		Blackouts	Binges		
Overdoses	Increased To [(need more t		GI Bleeding	Liver D	isease	
Sleep Problems	Seizures	0 0 /	Relationship Problems	Left Sc	hool	
Lost Job	DUIs		Assaults	Arrests		
Incarcerations	Homicide		Other:			
Longest Period of So			How long ago?			
Triggers to use (list all that apply):						
Has client traded sex for drugs? No Yes, explain:						
Has client been tested for HIV?						
If yes, date of last test: Results:						
Has client had any of the following problem gambling behaviors? Select all that apply:						
Gambled longer than planned						
Lost sleep thinking of g			or savings to gamble while let	tting bills go u	npaid	
Borrowed money to ga						
Been remorseful after			or considered breaking the		gambling	
Other:		Gambled to get money to meet financial obligations				

Risk Taking/Impulsive Behavior	(current/past) - select all that a	pply:
Unprotected sex	Shoplifting	Reckless driving
Gang Involvement	Drug Dealing	Carrying/using weapon
Other:		

Abuse/Neglect/Exploitation Assessment

History of neglect (emotional, nutritional, m	edical, educational) or ex	ploitation?						
If yes, please explain.								
Has client been abused at any time in the p	ast or present by family	significant oth	ars or anyone					
else?)	ast of present by family, a	significant oth	ers, or anyone					
Type of Abuse	By Whom	Client's	Currently					
Type of Abuse	By Whom	Age(s)	Occurring? Y/N					
Verbal Putdowns		Age(3)						
Being threatened								
Made to feel afraid								
Pushed								
Shoved								
Slapped								
Kicked								
Strangled								
Hit								
Forced or coerced into sexual activity								
Other								
Was it reported?	To whom?							
Outcome								
Has client ever witnessed abuse or family v	iolence? 🗌 No	🗌 Yes, exp	olain:					

Strengths/Weaknesses		Yes	No		
Client is able to seek out appropriate re					
problems.					
Client is able to identify both his/her stre	engths and weaknesses.				
Comments:					
Strengths/Resources (enter score if	present) 1 = Adequate, 2 = Above	e Average, 3 = Ex	ceptional		
Family Support	Social Support Systems		Relationship Stability		
Intellectual/Cognitive Skills	Coping Skills & Resiliency		Parenting Skills		
Socio-Economic Stability Communication Skills Insight & Sens					
Maturity & Judgment Skills					
Comments:	· · ·				
Describe appropriateness & level of	need for the family's participation:				

Mental Status E	Exam									
Category	Category Selections									
GENERAL OBSE	RVATIONS									
Appearance	Well groomed	Unk	emp	ot		Dishevele	ed			Malodorous
Build	Average	🗌 Thin			Ē	Overweig			Ē	Obese
Demeanor	Cooperative	Host	tile			Guarded				Withdrawn
	Preoccupied] Demanding					Se	eductive
Eye Contact	Average			Decreased					In	creased
Activity	Average			Decreased					In	creased
Speech	Clear	Sluri	red			Rapid				Slow
	Pressured	Soft				Loud				Monotone
	Describe:									
THOUGHT CONT										
Delusions	None Reported	🗌 Gra	ndio			Persecut	ory	_		Somatic
	Bizarre			Nihilist] R	eligi	ous
	Describe:									
Other	None Reported			of Content	ļļ	Obsessio	-			Compulsions
	Phobias	🗌 🗌 Guil	t		ļļ	Anhedor				Thought Insertion
	☐ Ideas of Reference					Thought	Broado	cas	ting	
• • • • • • • • • • • • • • • • • •	Describe:									
Self Abuse	None Reported			()			utilizati	on		
	Suicidal (assess let							~		🗌 Plan
Aggressive	None Reported		٩gg	ressive (asse	ess		preser	nt)		
PERCEPTION						🗌 Plan				
	None Departed			Auditory				1.7		1
Hallucinations	None Reported			Auditory				_	isua	
	Olfactory			Gustatory] []	actil	e
Other	Describe:		ion		l r	Denerae	nalizati	00		Derealization
THOUGHT PROC	None Reported	🗌 Illus		5		Deperso	nalizati	on		
	Goal Orie	nted			ım	stantial		ГГ	٦та	angential
								╞		oncrete
Blocked	Flight of					verative		╞		erailment
Describe:		0000				Volutivo				
MOOD										
		Depress	ed] Anxic	bus		
Angry		Euphoric					Irritab	ble		
AFFECT			-							
☐ Flat	Inapprop	riate		Labil	е			Г	ΠВІ	unted
Congruent with		Full			-		1 Cons	tric		
BEHAVIOR										
☐ No behavior is	sues	Assaultiv	/e				Resis	star	nt	
		Agitated					Hype			
		Sleepy					Intrus			
MOVEMENT		0.001							-	
Akasthisia	🗌 Dystonia			Tardi	ive	e Dyskinesia	a	Γ	Ti	CS
Describe:						5				
COGNITION										
Impairment of:	None Reported			🗌 Orier	nta	ation			Μ	emory
	Attention/Concentra	tion		🗌 Abilit	y t	to Abstract				
	Describe:									
Intelligence	Mental Retardation	Boro	derl	ine	[Average				Above Average
Estimate										-
IMPULSE CONTR	ROL	Goc] [Poor				Absent
INSIGHT		Goo				Poor				Absent
JUDGMENT		Goo Goo	d		[Poor				Absent

RISK ASSESSME	ENT						
Risk to Self	Low	🗌 Medium	🗌 High	Chronic			
Risk to Others	Low	Medium	🗌 High	Chronic			
Serious current risk of any of the following: (Immediate response needed)							
Abuse or Family Violence Yes No Abuse or Family Violence Yes No							
Psychotic or Severely Psychologically Disabled Yes No							
Is there a handgun in the home? Yes No Any other weapons? Yes No							
Plan:							
Safety Plan Revi	ewed 🗌 Yes	🗌 No					

Diagnoses and Interpretive Summary

Biopsychosocial formulation				
	DSM IV-TR Provisional Diagnoses			
Axis I				
Axis II				
Axis III				
Axis IV				
Axis V				

Treatment Acceptance/Resistance					
Client accepts problem?					
Client recognizes need for treatment? No Yes Comment:					
Client minimizes or blames others? No Yes Comment:					
External motivation is primary?					

Preliminary Treatment Plan & Referrals

Preliminary Biopsychosocial Treatment Plan					
Biological:					
Psychological:					
Social/Environmental:					
Referrals					
Psychiatrist	Psychologist	Medical Provider	Spiritual Counselor		
Benefits Coordinator	Nutritionist	Rehabilitation	Vocational Counselor		
Social Worker	Community Agency:	Othe	er:		

Physical Fitness (Optional)

 Physical Activity (please select one of the following based on activity level for the past month): Avoids walking or exertion, e.g. always uses elevator, drives whenever possible instead of walking. 	
	Walks for pleasure, routinely uses stairs, occasionally exercises sufficiently to cause heavy breathing or perspiration.
	Participates regularly in recreation or work requiring modest physical activity such as golf, horseback riding, calisthenics, gymnastics, table tennis, bowling, weight lifting, and yard work. 10-60 minutes per week More than one hour per week
	Participates regularly in heavy physical exercise , such as running, jogging, swimming, cycling, rowing, skipping rope, running in place or engaging in vigorous aerobic activity such as tennis, basketball or handball. Runs less than a mile a week or engages in other exercise for less than 30 minutes per week Runs 1-5 miles per week or engages in other exercise for 30-60 minutes per week Runs 5-10 miles per week or engages in other exercise for 1-3 hours per week Runs more than 10 miles per week or engages in other exercise for more than 3 hours per week