Katherine E. Walker, PhD, LPC, NCC, BCIA-C
Licensed Professional Counselor
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Child / Adolescent Counseling and Coaching Intake Form

Today's Date: _____

Name: _____
(Last) (First) (Middle Initial)

Birth Date: _____ /_____ /_____ Age: _____ Gender: ☐ Male ☐ Female

Ethnicity: ☐ Asian ☐ Hispanic / Latino ☐ African-American ☐ Caucasian Other: _____

STUDENT STATUS:

Name of School and Grade Level: _____

PARENT / GUARDIAN RELATIONSHIP STATUS:

☐ Single ☐ Dating ☐ Partnered / Significant Other ☐ Married ☐ Separated ☐ Divorced ☐ Widowed

Duration of Relationship: _____ Number of Children: _____ Children Still Residing in the Home: _____

Who is the primary / custodial parent? _____

PARENT / GUARDIAN STUDENT / EMPLOYMENT STATUS:

☐ Full-Time Employed ☐ Part-Time Employed ☐ Homemaker / Caretaker ☐ Legally Disabled

☐ Unemployed ☐ Retired ☐ Full-Time Student ☐ Part-Time Student ☐ Active Volunteer

PHYSICIAN INFORMATION:

Referring Physician: _____ Phone: _____

Address: _____ City:_____ State: _____ Zip Code: _____

Primary Care Physician (PCP): _____ Phone: _____

Address: _____ City:_____ State: _____ Zip Code: _____

PARENT CONTACT INFORMATION:

Mailing Address:
_____
_____
_____

Physical Address (If Different):
_____
_____
_____

May I send mail to the above mailing address? ☐ Yes ☐ No

Telephone Numbers / Email Address (Please provide only numbers at which you give me permission to call you):

Home: _____ May I leave a message? ☐ Yes ☐ No
Work: _____ May I leave a message? ☐ Yes ☐ No
Cell: _____ May I leave a message? ☐ Yes ☐ No
Email*: _____ May I email you? ☐ Yes ☐ No
*Please be aware that email might not be confidential.

Name of Other Contact Person in Case of Emergency: _____

Telephone #: _____ **Relationship:** _____

CHILD / ADOLESCENT MENTAL HEALTH HISTORY:

1. Is your child / adolescent currently receiving psychotherapy elsewhere? ☐ Yes ☐ No

2. Has your child / adolescent ever had psychotherapy in the past? ☐ Yes ☐ No

3. If yes, previous therapist's name to either question above: _____

   When? _____ Duration of treatment: _____

   Focus of treatment / presenting issue: _____

4. May I contact your child's / adolescent's primary care / referring physician to coordinate care**?** ☐ Yes ☐ No

5. In the past year, has your child / adolescent experienced any significant life changes, stressors, loss / grief, crisis, or trauma?

   ☐ Yes ☐ No

   If yes, please describe: _____

6. Has your child / adolescent ever experienced or are currently experiencing any of the following? ☐ Yes ☐ No

   ☐ Depression / feeling down / apathy
   ☐ Bipolar disorder / extreme mood swings
   ☐ Anxiety disorder / panic attacks (most recent occurrence): _____
   ☐ Phobias (phobia triggers): _____
   ☐ Sleep disturbance (e.g., difficulty falling or staying asleep, sleeping too much / too little, restlessness, etc.)
   ☐ Schizophrenia / hallucinations (auditory / visual)
   ☐ Unexplained memory lapses
   ☐ Alcohol / prescription medication / recreational drug abuse
   ☐ Frequent body complaints (e.g., achiness, persistent pain, migraine / tension headaches)
   ☐ Eating disorder (previous or current treatment): _____
   ☐ Body image issues
   ☐ Low self-esteem / low self-confidence
   ☐ Repetitive thoughts or behaviors (e.g., obsessions, rituals, etc.)
   ☐ Problems with concentration, focus, learning disability
   ☐ Trauma history / crisis
   ☐ Homicidal thoughts / acts of aggression
   ☐ Suicidal thoughts / attempts (last attempt / hospitalization): _____

FAMILY MENTAL HEALTH HISTORY:

Has anyone in your family experienced difficulties with any of the following? □ Yes □ No

- □ Depression
- □ Bipolar disorder / extreme mood swings
- □ Anxiety disorder / pain attacks
- □ Phobias (phobia triggers): _____
- □ Sleep disturbance (e.g., difficulty falling or staying asleep, sleeping too much / too little, restlessness, etc.)
- □ Schizophrenia / hallucinations (auditory / visual)
- □ Unexplained memory lapses
- □ Alcohol / prescription medication / recreational drug abuse
- □ Frequent body complaints (e.g., achiness, persistent pain, migraine / tension headaches)
- □ Eating disorder
- □ Body image issues
- □ Low self-esteem / low self-confidence
- □ Repetitive thoughts or behaviors (e.g., obsessions, rituals, etc.)
- □ Problems with concentration, focus, learning disability
- □ Trauma history / crisis
- □ Homicidal thoughts / acts of aggression
- □ Suicide attempts / completion (family member): _____

REASON FOR SEEKING COUNSELING FOR YOUR CHILD:

What is the reason you are seeking counseling or coaching services for your child / adolescent?

_____

_____

_____

_____

_____

What would you or your child / adolescent like to gain from this experience? What goals are we hoping to work toward?

_____

_____

_____

_____

_____

Please add anything else you feel would be relevant or helpful to know prior to our work together.

_____

_____

_____

_____

_____

Medical Problems

Active Problems / Health Concerns	Date of Onset

Surgical Procedures
(Last 10 Years Only)

Type of Surgery	Date of Surgery

Allergies

Drug / Food	Reaction

Current Medications Prescribed for Pain, Sleep Disturbance, Psychiatric Issues, Etc.

Medication	Dose	Start Date	Frequency	Reason for Taking	Prescribing Doctor

AUTHORIZATION OF PAYMENT OF SERVICES / INSURANCE INFORMATION

Credit Card Information and Authorization for Payment:

I,_____, authorize Katherine E. Walker, PhD, LPC, NCC, BCIA-C to charge the below-referenced credit card when I have not cancelled my child's / adolescent's scheduled appointment within 24 hours or fail to show for their scheduled appointment time. I understand that this also includes any appointment that is considered a client no-show or for any balance due that is owed due to my insurance company not covering services.

Type of Card:

MASTERCARD VISA DISCOVER AMERICAN EXPRESS

Account Holder Name Listed on Credit Card: _____

Credit Card Number (Please Include Dashes): _____

Credit Card Expiration Date: _____

Credit Card Security Code (3-Digits on Back of Debit, MasterCard, or Visa; 4-Digit on Front of American Express):

_____

Complete Billing Address for This Credit Card:

_____

_____

_____

_____ _____

Authorized Card Holder Signature Date

Insurance Information:

Insurance Carrier: _____ Plan Name: _____

Insured's Name: _____ Insured's ID Number: _____

Group ID Number: _____ Insured's Date of Birth: _____

Insured's Employer Name: _____

Insured's Address if Different from Client: _____

Please remember that I will be considered an out-of-network provider should you wish to use your insurance for reimbursement of payment for services. Let me know if you would like to submit claims to your insurance company and I will provide you with the information you will need to include on your member reimbursement claim.

Referral / Marketing Survey

To best help us accurately account for how clients initially find our professional services and to thank referral sources who directed you to us, please take a moment and check the box for which of the following best describes how you were initially referred to us. Additionally, please write in the name of the individual, medical or mental health practice name, or local business in the line provided if applicable.

- ☐ Referral by private health insurance such as supplemental health insurance provided by employer.
- ☐ Referral by employee assistance program, employee health, HR department, or supervisor / manager.
- ☐ Referral by a medical professional (include medical professional's name and practice name):

  _____

- ☐ Referral by another mental health professional (include mental health professional's name and practice name):

  _____

- ☐ Referral by someone who is seeing me or did see me for professional services (include individual's name):

  _____

- ☐ Posting of my business card or practice flyer in a local business (include name of business):

  _____

Online search engine listing or online general business directory listing:

- ☐ Best of the Web
- ☐ Bing
- ☐ Google
- ☐ Local
- ☐ Localeze
- ☐ Manta
- ☐ Mapquest
- ☐ Super Pages
- ☐ Yahoo
- ☐ Yellow Book
- ☐ Yellowbot
- ☐ Yelp
- ☐ YP / Yellow Pages

Online therapist directory listing:

- ☐ All Therapist
- ☐ Biofeedback Certification International Alliance
- ☐ Bio-Medical
- ☐ Good Therapy
- ☐ LGBT Center of Raleigh
- ☐ Marriage Counseling Guide
- ☐ National Board for Certified Counselors
- ☐ Network Therapy
- ☐ Psychology Today
- ☐ Sound Mindz
- ☐ Therapy Tribe
- ☐ Theravive

Social media website:

- ☐ Blogger
- ☐ Facebook
- ☐ Google+
- ☐ LinkedIn
- ☐ Twitter

Local print advertising:

- ☐ 919 Magazine – Wake Forest Edition
- ☐ The Wake Weekly

~ Thank You! ~