



**PATIENT INFORMATION - ADULT**

**Personal Identification**

Name: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 DOB: \_\_\_\_/\_\_\_\_/\_\_\_\_ Gender: \_\_\_\_\_ Pronoun (optional): \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_  
 E-mail: \_\_\_\_\_ May we email you (Y/N)? \_\_\_\_\_  
 May we: call (Y/N)? leave message (Y/N)?  
 Telephone: Home: \_\_\_\_\_  
 Work: \_\_\_\_\_  
 Mobile: \_\_\_\_\_  
 Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_ Years at work: \_\_\_\_\_  
 Marital/relationship status: \_\_\_\_\_  
 Partner name: \_\_\_\_\_ Occupation: \_\_\_\_\_  
 Names and ages of children: \_\_\_\_\_

**Billing information**

Please check one: ( ) self-pay ( ) Insurance ( ) other: explain \_\_\_\_\_  
 Responsible party for payment \_\_\_\_\_ Telephone: \_\_\_\_\_  
 Insurance company to be billed \_\_\_\_\_ Group # \_\_\_\_\_  
 Primary insured's name: \_\_\_\_\_ ID # \_\_\_\_\_  
 Primary insured's employer: \_\_\_\_\_  
 Primary insured's date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Social security # \_\_\_\_\_

**Treatment information**

Referred by: ( ) physician ( ) friend ( ) social media ( ) EAPs ( ) insurance ( ) SMFCC website  
 ( ) other website (list) \_\_\_\_\_ ( ) other (list) \_\_\_\_\_  
 Describe the nature of the problem that brought you here today:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Family physician: \_\_\_\_\_  
 List of medical problems: \_\_\_\_\_  
 List of medication (if any): \_\_\_\_\_  
 \_\_\_\_\_  
 Previous mental health treatment ( ) Yes ( ) No  
 Name of therapist, date seen and problem \_\_\_\_\_

Relative or friend we may contact in case of emergency  
 Name: \_\_\_\_\_ Telephone # \_\_\_\_\_

Who completed this intake form? \_\_\_\_\_ Relationship to the client: \_\_\_\_\_