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## Client Information Form

Today's date: \_\_\_\_/\_\_\_\_/\_\_\_\_ Note: If you were a client here before, please fill in only the information that has changed.

### A. Identification

Your name: \_\_\_\_\_ Date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Age: \_\_\_\_\_

Other names you have used (maiden, nicknames, aliases): \_\_\_\_\_

Pronouns:  He/Him  She/Her  They/Them  Other: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email address: \_\_\_\_\_ May we send a message? Yes No

Mobile phone: \_\_\_\_\_ May we leave a message? Yes No May we send a text? Yes No

Other phone: \_\_\_\_\_ May we leave a message? Yes No

Gender identity (*optional*): \_\_\_\_\_  Talk about later

Sexual orientation (*optional*): \_\_\_\_\_  Talk about later

Racial/ethnic identities (*optional*): \_\_\_\_\_  Talk about later

Religious/spiritual traditions or identity (*optional*): \_\_\_\_\_  Talk about later

Other ways you identify yourself and consider important: \_\_\_\_\_

### B. Referral

Who gave you my name to call? Name: \_\_\_\_\_

Phone: \_\_\_\_\_

If a professional, may I let this person know that you have come to see me? Yes No

### C. Current Problems or Difficulties

Please describe the main difficulties that led to your coming to see me:

When did these problems start?

What makes these problems worse?

What makes these problems better?

With therapy, how long do you think it will take for these to get a lot better? \_\_\_\_\_

**D. Your Education and Training**

How many years of school have you had?  High School  AA/AS  BA/BS  Master's  PhD/MD

Degrees/certificates: \_\_\_\_\_ Field(s) of study: \_\_\_\_\_

**E. Employment and Military Experiences**

Employer: \_\_\_\_\_ Address: \_\_\_\_\_

Job Title: \_\_\_\_\_

How long have you worked with this employer? \_\_\_\_\_

Have you been in the military? Yes No From: \_\_\_\_\_ to: \_\_\_\_\_ Highest rank held? \_\_\_\_\_

**F. Family-of-Origin History**

*Members of your family as you grew up:*

| Relative          | Name | Current age (or age at death) | Illnesses (or cause of death, if deceased) | Education | Occupation |
|-------------------|------|-------------------------------|--|-----------|------------|
| Parent/Guardian 1 |      |                               |  |           |            |
| Parent/Guardian 2 |      |                               |  |           |            |
| Stepparents       |      |                               |  |           |            |
|                   |      |                               |  |           |            |
| Brothers          |      |                               |  |           |            |
|                   |      |                               |  |           |            |
| Sisters           |      |                               |  |           |            |
|                   |      |                               |  |           |            |

If you were adopted or raised by other than your biological parents, how old were you when this started? \_\_\_\_\_

Which of the following best describes the family in which you grew up?  Warm/accepting  Average

Indifferent/Dismissive  Hostile/fighting  Other: \_\_\_\_\_

How did you get along with your family when you were a child?  Poorly  Average  Well

How do you get along with your family now?  Poorly  Average  Well  Does not apply

Did your family have any problems (e.g., alcoholism, violence) that may have affected your childhood development?

Yes  No  Don't know

Is or was there anything unusual about your family?  No  Yes: \_\_\_\_\_

**G. Your Significant Relationships (past and present)**

| Name of partner/spouse | Partner's age when started | Partner's current age | Your age when started | Did you marry? | Your age when ended | Reasons for ending |
|------------------------|----------------------------|-----------------------|-----------------------|----------------|---------------------|--------------------|
|                        |                            |                       |                       |                |                     |                    |
|                        |                            |                       |                       |                |                     |                    |
|                        |                            |                       |                       |                |                     |                    |

**H. Children**  None

In the last column below, indicate those from your current marriage with "Y," those from a previous marriage or relationship with "P," and your current stepchildren with "S."

| Name | Current age | Sex | School | Grade | Adjustment problems? | Yours? Previous? Step? |
|------|-------------|-----|--------|-------|----------------------|------------------------|
|      |             |     |        |       |                      |                        |
|      |             |     |        |       |                      |                        |
|      |             |     |        |       |                      |                        |

Who else lives in your household *not listed above*?

| Name | Current age | Relation |
|------|-------------|----------|
|      |             |          |
|      |             |          |

**I. Health & Mental Health Information**

From whom or where do you get your medical care? Clinic/doctor's name: \_\_\_\_\_

Do you have any medical conditions or physical limitations?    Yes    No

If yes, please describe: \_\_\_\_\_

Are these conditions and/or limitations being treated by a medical professional?    Yes    No

Have you previously received any type of mental health services (psychotherapy, psychiatric services, etc.)?    Yes    No

If yes, please describe below:

| When (dates)? | For what (diagnosis)? | What kind of treatment? | Where or from whom? | With what results? |
|---------------|-----------------------|-------------------------|---------------------|--------------------|
|               |                       |                         |                     |                    |
|               |                       |                         |                     |                    |

Would you like me to contact any of your other health or mental health providers?    Yes\*    No

*\*If yes, please fill out a Release of Information.*

Has any relative had inpatient treatment for a psychiatric, emotional, or substance use disorder?    No    Yes

If yes, please describe:

Are you currently taking any prescription medication, including anti-depressants, etc.?    Yes    No

If yes, please list below:

| Current medications | For what condition? | Prescribed by: | Are medications being taken as prescribed? |
|---------------------|---------------------|----------------|--|
|                     |                     |                | Yes    No                                  |

Please list any over-the-counter medications or supplements you are currently taking:

Is there any history of physical, emotional, racialized or sexual trauma that you've experienced?

Yes     No     Talk about later

How would you rate your current physical health?     Excellent     Good     Fair     Poor     Extremely poor

How would you rate your current sleeping habits?     Excellent     Good     Fair     Poor     Extremely poor

How many times per week do you generally exercise? \_\_\_\_\_

Please list any difficulties you experience with your appetite or eating patterns:

Are you currently experiencing overwhelming sadness, grief, or depression?    Yes    No

Are you currently experiencing  anxiety,  panic attacks, or  have any phobias?

Are you currently experiencing any chronic pain?    Yes    No

### J. Chemical Use

1. Do you smoke or chew tobacco?     Smoke     Chew    # of packs per week : \_\_\_\_\_
  - a. Do you use vapor or e-cigarettes?    No    Yes    If yes, how many per week? \_\_\_\_\_
2. How many drinks of beer, wine, or hard liquor do you consume in a typical week? \_\_\_\_\_
  - a. Have you ever felt the need to cut down on your drinking?    No    Yes
  - b. Have you ever felt annoyed by criticism of your drinking?    No    Yes
  - c. Have you ever felt guilty about your drinking?    No    Yes
  - d. Have you ever received a DUI?    No    Yes
  - e. Did you ever drink to unconsciousness, or run out of money because of drinking?    No    Yes
3. Which drugs (not medications prescribed for you) have you used in the last 10 years? \_\_\_\_\_
4. Do you think that you have a drug or alcohol problem?    No    Yes    Unsure

### K. Emergency Information

If some kind of emergency arises, whom should we call?

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Significant other/nearest friend or relative not living with you: \_\_\_\_\_

### L. Financial Information

Insurance company: \_\_\_\_\_ Phone: \_\_\_\_\_

Policy #: \_\_\_\_\_ Group #: \_\_\_\_\_

Name of insured (if other than yourself): \_\_\_\_\_

Address of insured (if other than yourself): \_\_\_\_\_

Relationship to insured: \_\_\_\_\_ Insured's date of birth: \_\_\_\_\_

Deductible: \_\_\_\_\_ Deductible met?    Yes    No    Co-pay: \_\_\_\_\_

### M. Other

Is there anything else important for me to know about that you have not written about?

No    Yes

*This is a strictly confidential patient medical record. Rediscovery or transfer is expressly prohibited by law.*