

Counselling/ Coaching Intake Form

First Name: _____ Last Name: _____

Date of Birth (MM/DD/YYYY): _____ Address: _____

City: _____ Postal Code: _____ Phone: _____ Cell: _____

Emergency Contact: _____

Email: _____

Family Doctor (Name and Contact): _____

List all current medications: _____

List use of other professional services (i.e. naturopathic/homeopathic remedies/vitamins):

Reason for Seeking Treatment:

Please describe the problems you are experiencing (what has happened to cause you to seek help at this moment, how do you handle stressors/cope with problems etc):

Do you currently have thoughts/ urges/ considerations of harming/ hurting/ killing yourself? Yes No

Or someone else? Yes No If yes, whom, please explain? _____

Have you in the past? Yes No If Yes, how long ago? _____

Do you currently have thoughts of wishing you were dead? Yes No

Have you ever had previous therapy/counseling of any kind? Yes No If yes, when, with whom, and for how long?

Have you ever been hospitalized for emotional problems? Yes No Or for substance abuse problems? Yes No

If yes to either of the above, please note when, where, and for how long were you hospitalized?

Please check all of the items below that describe your situation:

- Abuse/trauma – physical, sexual, emotional, neglect
- Aggression, violence, threats
- Alcohol use
- Anger, hostility, arguing, irritability
- Anxiety, nervousness
- Attention, concentration, distractibility
- Career concerns, goals, and choices
- Childhood issues
- Codependence
- Confusion
- Compulsions and/or obsessions (thoughts or actions that repeat themselves)
- Decision-making, indecision, mixed feelings, putting off decisions
- Delusions (false ideas)
- Dependence
- Depression, low mood, sadness, crying
- Divorce, separation, marital conflict, infidelity/affairs
- Drug use – prescription medications, over-the-counter medications, street drugs
- Eating problems – overeating, under-eating, appetite, vomiting
- Emptiness
- Failure
- Fatigue, tiredness, low energy
- Fears, phobias
- Financial or money troubles, debt, impulsive spending, low income

- Gambling
- Grieving, mourning, deaths, losses, divorce
- Guilt
- Headaches, other kinds of pains
- Health, illness, medical concerns, physical problems
- Inferiority feelings
- Impulsiveness, loss of control, outbursts
- Irresponsibility
- Judgment problems, risk taking
- Legal matters, charges, suits
- Loneliness
- Memory problems
- Mood swings
- Oversensitivity to rejection
- Panic or anxiety attacks
- Perfectionism
- Pessimism
- Procrastination, lack of motivation
- Relationships problems (with friends, with relatives, or at work)
- School problems
- Self-centeredness
- Self-esteem
- Self-neglect, poor self-care
- Sexual issues, dysfunctions, conflicts, identity issues
- Sleep problems (too much, too little, insomnia, nightmares)
- Spiritual, religious, moral, ethical issues
- Stress and tension
- Suspiciousness
- Suicidal thoughts
- Temper problems, self-control, low frustration tolerance
- Thought disorganization and confusion
- Weight and diet issues
- Withdrawal, isolation
- Work problems, employment issues

Substance Use History:

Have you ever experienced a problem with alcohol, drugs, or prescription medications? Yes No If yes, please explain:

Have you ever been treated for problems with alcohol, drugs, or abuse or prescription medications? Yes No If yes, please explain:

Has anyone (family, doctors, friends, coworkers, bosses, etc.) ever expressed concern that you might have a problem with alcohol or drugs?

Yes No If, Yes, please explain: _____

Have you had any problems related to use of alcohol/drugs in the past year? Yes No

If, yes, please explain: _____

Early Personal History:

Birth: _____ Childhood Traumas/(Any) Behaviour issues: _____

Memories that stand out: _____

Family Circumstances (growing up years):

Check the statement(s) below that describe the type of family you grew up in: overly close family no "breathing room" everyone was in everyone else's business no privacy boundaries not respected comfortably close family loving shared

many positive experiences supportive distant, everyone did their own thing not much time spent together not a lot of support angry, lots of fighting/hostility verbal abuse and conflicts violence frightening scared to make mistakes

Have any biological relatives ever had any emotional problems or substance abuse? Yes No If yes, please explain:

Has anyone in your family ever attempted or committed suicide? Yes No If yes, please explain:

Medical History:

Please list significant medical problems/conditions, and indicate if you are receiving treatment for them:

Do any of these problems affect your everyday life? Yes No If Yes, how so?

Briefly describe any surgeries or hospitalizations for serious illness or injuries (What, where, when, etc.):

Have you ever blacked out/lost consciousness and/or experienced any type of serious head injury or trauma?
 Yes No If so, please indicate when and what happened.

List all medications that you currently use:

How often do you use the following?

Alcohol: _____/day_____/week_____/month Recreational drugs: _____

Caffeine: _____/day_____/week_____/month Sugars: _____/day_____/week_____/month

Education History:

List any and all educational experiences from past to present and highest level of completion:

Employment History:

List any and all occupational experiences from past to present

Past: _____

Present: _____

Relationship History (please circle):

Single: Yes No Details: _____

Married: Yes No Details: _____

Divorced: Yes No Details: _____

Children: Yes No How many? _____ Gender/Age(s) _____

Comments regarding stresses in current or previous marriage(s)/relationship(s):

If you have had problems in the past, what do you think caused those relationships to end?

Have you ever been abused mentally or physically by a romantic partner? Yes No

Does this apply to your current relationship? Yes No

Do you feel safe? Yes No

Leisure Activities: _____

Spiritual Practice: _____

INFORMED CONSENT – Counselling & Coaching

TO THE CLIENT: You have the right, as a client, to be informed about therapy treatments of Counselling & Coaching, so as make an informed decision whether or not to undergo the recommended treatment modalities after knowing the benefits and or risks involved. This document is not meant to alarm you; it is simply to inform you that you may give or withhold your consent to counselling. I have agreed to the terms outlined:

If you refuse any future therapy this will not affect your receiving other care or future treatments in the Clinic.

- I **voluntarily accept** Alda Henriques (Coach, Talk Therapy, Neurofeedback, Access Bars & Body Processes Practitioner), Trudy Winders (Counsellor, Grief, Group, Couples Therapist) and Marina Kresovic (Access Bars, Body Processes, Reiki Practitioner) to provide services: Counselling and Coaching in my best interest, to better my health condition.
- I understand that anything I discuss in the above services with Alda Henriques, Trudy Winders, Marina Kresovic is strictly confidential.
- I also understand that I must give express written or verbal permission to Alda Henriques, Trudy Winders, Marina Kresovic to share any aspect of our work together that would identify me specifically and breach confidentiality.
- The only exceptions to confidentiality are in such cases where the issue of potential harm to myself and/or others is disclosed. I acknowledge that in such cases my own safety and/or the safety of others takes priority if the appropriate authorities need to be notified without my consent.
- By signing below I acknowledge that the limits of confidentiality have been explained in full to me, that any questions I have pertaining to the limits of confidentiality have been addressed, and that I am free at any time to request further clarification.
- I understand that there may be some health benefits and risks with Counselling and Coaching.
- I understand that I have the right and the opportunity to ask questions about my condition, discuss further therapy sessions, or any other therapy modalities at any given time.
- I may request additional information regarding the above services.
- I may cancel the appointment up to 24 hours prior to a scheduled session. A missed appointment will mean a missed session and it will not be refunded. (A business day is defined as Monday to Friday, excluding Holidays).
- I understand that all the plans/programs purchased are non-refundable and that the payment must be made before the first session of any of the plans purchased.
- I agree to allow my contact information be exchanged with the other medical professionals within Visionary Health or Team of Care under the guidelines/ jurisprudence of the institute in relation to the above services.
- Payment of services will be expected, based on the fee schedule.
- If any additional telephone, electronic, email or online services apply, I will be informed, and fees could be incurred.
- I further understand that any insurance reimbursement will be my responsibility until I authorize for direct billing to my insurance provider.
- Appointments will ordinarily be 60-90 minutes in duration, unless we agree to additional time and charges.
- In an emergency situation, I understand that I should not solely rely on reaching the practitioner and if there are any indications of an emergency, I am to go to my local hospital, contact the police department or dial 911.
- I understand that no warranty or guarantee regarding a promise of cure as a result of care is provided for any condition.
- I understand that a record will be kept of the health services provided to me and will be kept confidential.
- I give consent and authorize Visionary Health Medical Educational Clinic practitioner to contact me in the near future for continued treatment.
- I authorize Visionary Health Medical Educational Clinic to make contact to inform me of educational events, promotions, incentives, newsletters, and of any health benefits.
- I certify that I have read this form or have had it read to me, and that I understand its contents and meaning. I have sufficient information to give this informed consent.
- If the client is a minor under 18 years of age, I the undersigned, take full responsibility and acknowledge agreement to the above statements and act on their behalf.
- I am consenting to a virtual session or an in person clinic and agree to above.

Patient Name:

Patient Signature:

Date:
